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The Leadership Practice of Museum Educators

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THE LEADERSHIP PRACTICE OF MUSEUM EDUCATORS

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Educational Leadership

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ABSTRACT

This grounded theory study is an examination of the culture, context, conditions and competencies of a set of six museum educators from a large city in the United States. Participants were education department leaders from a variety of museum types, including: A science museum, an ethnic arts museum, a settlement house museum, a children's museum, an aquarium, and a zoo. An analysis of data points to an emerging framework that codifies particular leadership settings and domains of practice for leaders of museum educators. An array of data collections were employed in the study, including: Semi-structured interviews, unstructured observations, written reflections to assigned readings, and professional development workshops. Primary source documents were also analyzed as part of this study. Research suggests that highly skilled leaders of museum educators possess an ability to lead in a variety of settings including leading IN their departments, UP the institutional hierarchy, ACROSS the institution and OUTside the institution. An emerging framework is articulated that includes four domains of leadership practice: The Teaching and Learning Domain, the Political Domain, the Financial Domain and the Operations Domain. Lastly, research suggests that the participants in this study share a common lens through which all their work is done, which is that of the visitor as a learner.

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"A truly good book teaches me better than to read it. I must soon lay it down, and commence living on its hint. What I began by reading, I must finish by acting."

Henry David Thoreau

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CHAPTER ONE

Introduction

In 2005 I was working as the director of a large education department at a science museum, which was on its fourth president in less than seven years. The museum was struggling financially, visitation was down and I had stopped growing professionally. I knew it was time to leave, but my intention in moving on was not to abandon the profession; instead, I seized the opportunity to build the foundation I felt I needed in order to advance my career in the museum profession.

In spite of the challenges facing the museum, I was fortunate. I was a leader in a department that was held in high regard by the institution as a whole. The education department was the largest in terms numbers of employees, my supervisor (the Vice President of Education) was a true partner with me in the work of our department, and we had very positive working relationships with most other departments in our museum. Despite high turnover at the president and senior staff levels we had a very positive organizational culture. Departments did not compete with each other, and it was a creative environment full of mission-driven individuals who liked to collaborate. Many of my museum colleagues at other area museums were not positioned as well in their institutions. Their education department offices were tucked away in museum basements or other far reaches of the institution, and they felt marginalized by their leadership. Competition for power and resources between departments was high, and the educational mission of the institution was not lived out in practice.

In 2006 I began working at a university. At the same time I began my graduate and doctoral studies while working full-time. I chose to pursue a degree in a principal

preparation program even though I had no intention of ever becoming a school principal. I was drawn to the program because I believed it would provide the leadership and pedagogical foundations I felt I was lacking. Because I was not a classroom teacher or a school administrator like my colleagues in the program, I needed to adapt course assignments so that they could be completed in learning settings that were outside of the school or classroom. In addition to examining the course literature, I selected and examined literature from the museum field as it related to the topics addressed in class. I conducted interviews; completed observations; reviewed written documents; created, distributed and analyzed surveys; and adapted and tested protocols and strategies used in schools for use in all kinds of museum settings. In addition, I designed and held focus groups with educators from a variety of cultural institutions ranging from historic sites to art museums. My initial goal was to grow as an individual, but I quickly surmised that others in my field would likely benefit from such a preparation program. As I proceeded in my coursework I began to look outward to the field at large. I asked myself a different set of questions: Would a program like the one I'm currently enrolled in be applicable to leaders of educators outside of schools? Are there universities that do such work? What is the current state of the profession of museum education? What is the current state of museums in America?

Through reading, reflection, writing, tool building and testing, conversations, more reading, more reflection, and more writing, I unearthed answers to these questions about the profession and about museums that launched me down new research paths. Each investigation yielded new insights that led to more questions, the answers to which led to emergent ideas. My ideas led to new questions for research, and the cycle began

again. The process was organic, cyclical in nature, and ongoing. What I didn't know at the time was that my research process in many ways mirrored a particular research methodology called grounded theory.

Stern (2007) describes the qualities of grounded theory best:

> Put simply, the reader will have an immediate recognition that this theory, derived from a given social situation, is about real people or objects to which they can relate. Furthermore, it must be clear that the developed theory comes from data rather than being forced to fit an existing theoretical framework. Integration of the finished product needs to be executed in such a way that every component is in harmony with every other component with the precision of joined chemical particles. Additionally, while it must fit the social scene studied, it needs to be one of sufficient abstraction that it can apply to the larger world of social psychological and social structural situations (p. 114).

Grounded theory was the obvious choice of methodology for this dissertation because it appeared to me that I'd been practicing the process in a less formal fashion throughout my graduate and doctoral programs. Learning about grounded theory provided me a way to reflect on my findings over the past seven months in a systematic way for further scrutiny, and out of that scrutiny, to discover theories concealed in the data I had spent the last several years collecting. In September 2011 I set about gathering more data, this time including the formal structures for data mining and theory building prevalent in grounded theory methodology: I interviewed my participants, gathered written documents, completed countless rounds of coding, found themes in the codes, mined the data again and found more themes. When I felt I could mine no more, several theories emerged which are fully explicated later in this work.

What follows, then, is the culmination of five years of reading and writing about museums and museum education, which led me to the topic I've chosen for this dissertation: Understanding and articulating the current leadership practice of a particular

set of educational leaders in museums. However, I am hopeful that my research, theory building and tool development will continue well beyond the life of this work.

The organization of this dissertation is meant to reflect the process of grounded theory itself. Chapters Two through Four begin with questions, include data analysis, and lead to emergent themes which then present the next set of questions for research. Chapters Five and Six present the theories that came forth after several rounds of data mining. Chapter Seven, consistent with grounded theory, details my most significant learning throughout this process and puts forth the next set of questions. In this introductory chapter I present the problem, share established definitions, and articulate what the reader can expect to see in the remaining chapters. Additionally, it's important to know that, although Chapter Two is presented as a literature review, it is really the story of my document research into two central questions: How and when did the field of museum education begin in the United States? And, how has the profession evolved? Document analysis in Chapter Two enabled me to discover a through-line that connects the work of museum educators in the United States across time and aligns the evolution of the profession with major moments of change in our nation's history.

There are some grounded theorists who would argue that engaging in a literature review is risky and may "contaminate, stifle, or otherwise impede the researcher's effort to generate categories" (Glaser 1992, p. 31). However, the literature review I conducted provided a helpful and limiting orientation to the large topic of museum history in the United States and does not present any theory building or use a pre-defined framework.

In Chapter Three I provide a primer on grounded theory methodology and I articulate my approach to grounded theory. I explain how I formulated my study, how I

selected the participants, what the data collection activities were, and how I intend to analyze the data. Chapter Four introduces the participants in this study: The background experiences that prepared them to lead, the background and culture of their institution, and examples of their leadership in practice. In this chapter I also introduce the shared themes that emerged from all participants. These themes informed the theory development articulated in Chapters Five and Six. In Chapter Five I lay out data supporting my first theory: That one of the aspects of educational leadership in museums is, despite being the head of a department, each participant is leading from the middle of his or her institution, and that he or she must be successful in leading in other settings both internally and externally if he or she is to make an impact in the institution and in the profession. Chapter Six combines the theory of leadership settings, and my next two theories – leadership domains and leadership lens-- into an emerging leadership model for museum educators to consider. Chapter Seven culminates with new sets of questions as I begin to articulate my ongoing research on this topic.

Symptom of a Larger Problem

In 2008 the United States entered a recession the likes of which we had not seen since the Great Depression of the 1930's, the impact of which is still being felt in every sector of the country including museums. A survey, conducted at the beginning of this period of recession by Ron Kley of Museum Research Associates, indicted that recession-driven museum staff reductions indicate the possible loss of tens of thousands of museum personnel nationwide, and identified educators as among those most severely impacted. According to Kley, as many as 60% of the total staff cuts/freezes reported as of March 15, 2009 came from the ranks of museum education (Kley, 2009, p. 124). How did

museum educators find themselves in such a vulnerable position? Do leaders of museums think the educators that work there are dispensable? A growing body of literature describes an identity crisis among museum educators, and the profession itself is in need of a new leadership orientation; one that can bridge the gap between lessons of established leaders and the experiences of emerging leaders in anticipation of changing visitors and museum experience models.

Defining the Landscape

Upon leaving my post as Director of Education at a science museum I chose to focus my efforts as both a graduate student and an independent museum consultant on understanding what was missing from the museum education profession in terms of knowledge, practice and orientation. I knew the profession was lacking legitimacy, as Kley's survey results indicated, and I wanted to understand what was needed to bring about change. My work over the past five years was dedicated to the very notion that museum educators required a different kind of leadership orientation than currently exists. In the summer 2009 issue of the *Journal of Museum Education* I described in broad terms the type of leader who currently guides the educators in their institutions. Full disclosure, I counted myself as falling within this description of leader during my tenure as a Director of Education at a medium sized museum in the Midwest:

> They struggle bravely and mightily for their staff, shielding them as best they can from unrealistic mandates, grappling with increased pressure from senior staff and trustees for more 'WOW' experiences and dealing with ever-tightening budgets requiring them to do more with less (Nolan, 2009, p. 172).

Through reflection, study, and practice over the past five years I have come to this initial description of the type of leader I believe the profession requires:

> Museum educators will require *educational leadership* if they are to play a role in shaping the future museums of America. What is an educational leader? An educational leader is one who understands the practice and pedagogy of museum educators. They understand leadership principles such as organizational culture change and systems thinking. They have reflected deeply on their core values and stand by them, and they know how to mobilize others to lead. An educational leader knows how best to manage staff, but also understands that management is only one part of a much larger job. An educational leader places the highest value on the educational mission of the institution, endeavors to be the lead-learner, and is unafraid of taking risks and leading change (Nolan, 2009, p. 172).

As a starting point it is important to provide additional definitions for the areas of my study. Using a definition provided by the Museum and Library Services Act, museum is defined as:

> A public or private nonprofit agency or institution organized on a permanent basis for essentially educational or aesthetic purposes, that utilizes a professional staff, owns or utilizes tangible objects, cares for the tangible objects, and exhibits the tangible objects to the public on a regular basis. Such term includes aquariums, arboretums, botanical gardens, art museums, children's museums, general museums, historic houses and sites, history museums, nature centers, natural history and anthropology museums, planetariums, science and technology centers, specialized museums, and zoological parks (Museum and Library Services Act, 2002, p. 15).

In researching a standard definition for "museum educator," I could find no single agreed upon definition which encompassed all the work for which museum educators are responsible. Further, the term "museum educator" is not used by all who teach in such settings and is used interchangeably with such terms as "facilitator," "interpreter," "guide," and others. In 2006 the United Stated Environmental Protection Agency supported a project organized by the National Association for Interpretation to catalogue and establish a common vocabulary for those working in museums. The Definitions Project provided commonly agreed upon definitions for the following terms, all of which

are used interchangeably to describe those who teach or provide learning experiences for the public.

Table 1

Terms and Definitions for Museum Education Workers

Docent	A volunteer or paid educator trained to further the public's understanding of the natural, cultural, and historical collections or sites of an institution or facility
Educator	A person involved with the overall process or practice of facilitating learning. Educators often specialize in specific content areas or academic disciplines
Explainer	A person who is knowledgeable about a resource and is skilled in teaching others about that resource
Facilitator	A person who encourages and enables a process, such as learning, planning and training, interpreting, or teaching
Guide	A person who is knowledgeable about a resource and is skilled in teaching others about that resource, and often accompanies visitors from place to place in the area of the resource
Interpreter	A person who employs a mission-based communication process that forges emotional and intellectual connections between the interests of the audience and meanings inherent in the resource
Museum Educator	A specialist who is trained to further the public's understanding of the natural, cultural, and historical collections and mission of a museum

Naturalist	A person who is knowledgeable in and often educates others in the characteristics, processes, and history of the natural environment. A person who is an advocate of the doctrine that the world can be understood in scientific terms. A person who studies nature, including landscapes, plants, and animals, usually in their natural surroundings
Teacher	A person whose role is interpreting, explaining, training, and imparting knowledge and skills about people, places, objects, processes, and relationships with a goal to build meaning in the minds of learners

Given all of the terms and definitions provided in Table 1, and for the purposes of my dissertation work, I will use the term "museum educator" to encompass all types of paid teachers in museums. I describe museum educator as one who develops educational content or experiences in or for a museum setting, and one who facilitates learning in the museum setting and/or represents the museum by facilitating learning in non-museum settings. Settings can range from a school classroom or auditorium, to a museum classroom or exhibit, to a laboratory, to an outdoor natural area or historic site. Museum educators create and facilitate learning opportunities for a wide variety of audiences ranging from early childhood to k-12 school groups to family groups to teachers to adults. Their programs range from hands-on lessons to conversation-based or object-based interpretation; from the development of exhibit interactives and floor programs to guided tours; and from online experiences to lectures.

Imagining the Role Museum Educators Can Play in the Future of American Museums

"Museums as a community have never been more successful in our society, and Museums have never been as challenged."

John Falk, Ph.D.

In his acceptance speech at the 2010 American Association of Museums (AAM) Conference in Los Angeles, internationally known museum thought leader John Falk challenged museum educators to play a more critical role in shaping the future of American museums. At the time this speech was given Dr. Falk was accepting the John Cotton Dana Leadership Award from the AAM Education Committee for his innovative museum work at the national level. I couldn't help but admire the sense of urgency he gave to the most pressing issue facing Museums in our country: being relevant and of value to the public. In this time of economic uncertainty, political polarity, educational inequity, and environmental fragility it appears that museums play a peripheral role at best in being of service to the greater good.

Dr. Falk is one of a handful of nationally known leaders in museum education. There are plenty of charismatic personalities among the upper echelons of museum leadership – some influential and innovative like Dr. Emlyn Koster, President and CEO of the Liberty Science Center in New Jersey, who "advocate[s] that a museum's external value hinges on whether its experiences help to illuminate the challenges and opportunities surrounding society and the environment."

There are some who approach leadership solely from the financial perspective, like the former president of a museum in a large city in the Midwest who inside the small space of three years let money drive the institutional mission only to experience a significant drop in visitation, a painful decrease in philanthropic giving, and a mass exodus of 60% of the full time staff. It is unclear how many of these leaders approach their role through the lens the visitor as a learner (as opposed to the visitor as a consumer), placing the learner at the center of their work. It is also unclear how many of these leaders impact the profession on a national or international scale.

In order for the museum education profession to lead the way toward realizing a new future for museums, I believe we will require many, many more educational leaders who understand how to bring about drastic change both in their museums and among the museum community at large.

In 2009 I guest edited an issue of the *Journal of Museum Education* entitled, Educational Leadership. In this issue I outlined the current state of the profession of museum education, highlighted what I thought was needed and gave others an opportunity to put forth their vision of the future of museum education. I provided resources for others to draw from, and placed the urgency for this work squarely on the shoulders of museum educators themselves:

> Let's face it, the world is changing rapidly and many of the old ways of doing business are not easily adapted to today's society. John Falk and Beverly Sheppard's book, *'Thriving in the Knowledge Age,'* attests to this very notion: "At a time when many people all over the world feel that their core institutions are failing them, we should be increasingly attuned to the dramatic changes taking place in society. The familiarity of an Industrial Age, the time in which museums as we know them were born, is yielding to the new challenges of a Knowledge Age. No institution, however cherished, will be untouched by the economic, social, and political

changes that are sweeping old ways aside" (p.8). Falk and Sheppard's book was published in 2006, well before the American economy entered into a full-fledged recession. The new reality is playing itself out now in the lives of our colleagues; the ones who've lost their jobs and the ones who've been left behind to do more with considerably less.

We are in a moment of great change. And with such change comes a golden opportunity. It is in this moment in our history that museum educators can help to re-shape not only their profession, but the future of the relationship between the public and its cultural institutions. Museum educators can and should play a critical role in shaping the future of museums in America, but they will require educational leaders to pioneer new practices, advocate in new ways for their staff, and come together to articulate a new role and a consistent identity for the museum educators they serve" (Nolan, 2009, p. 173).

CHAPTER TWO

REVIEW OF LITERATURE: THE EMERGENCE OF MUSEUM EDUCATION AS AN OCCUPATION IN THE UNITED STATES

Introduction

Museums in America have a history that dates back to the late 1700's, but how and when did the field of museum education begin? How has the profession evolved? In a review of literature I found many sources that addressed the history of American museums as a whole. I discovered some museum movements that coincided or immediately followed times of great change in our nation's history -- from the emergence of public museums after the Civil War to the growth of museums during the Industrial Revolution; from the impact of the Great Depression on museums to the creation of a new kind of museum, the Science Center, after the launching of Sputnick; from new approaches to exhibit development after the Civil Rights movement of the 1960's to the advances pioneered in online environments in the 1990's and the beginning of the 21st century. I discovered major rifts among museum professionals, especially between museum curators and museum educators, and I discovered the circumstances that led to the emergence of visitor studies and social science research in museum education.

However, throughout my review I was struck to find that there were few trade books, scholarly articles or dissertations that specifically articulated the history of an emerging museum education profession in America aside from a scant introduction or single chapter. I found short references to museum education alongside the history of museum collections and curatorship, references to museum education through research about exhibit design, museum education mentioned within the context of the changing

role and purpose of Museums in American society, and museum education compared with the progressive education movement in public schools at the beginning of the 20th century. I also found literature profiling compelling museum educators of the early 20th century. Those individuals often stood at the helm of their institution. Who were these educators and where did they come from? What educational practices did they pioneer? How were they trailblazers within the museum education profession? How were they similar to classroom teachers and how were they different?

I think it is important to note here that along the way I was often side-tracked in pursuit of the literature. It was easy to digress into other areas of museum history in America (influential museum presidents, famous curators, the history of exhibit design, etc.) but I made a deliberate decision to focus as much as possible on the museum educator role – all this in an attempt to better understand the current state of the profession as I prepared to conduct research into the area of the profession I believe is most in need of study: The leadership practice of museum education managers, directors, vice-presidents, and education curators. That is not to say that context is unimportant in understanding how the position of museum educator came to be, so I have provided a bit of historical context on the state of museums at critical moments in our nation's history.

Therefore, in this literature review I aim to create a coherent, albeit brief, timeline that describes the birth of the museum educator staff position in American museums to the current state of the profession of museum education, rife with its own movements, debates, challenges, and opportunities.

Section one provides an overview of the beginnings of museum education as it coincided with the progressive education movement of the late 19th and early to mid- 20th centuries when American museums, borne out of the private collections of the wealthy, emerged as democratic public institutions. I highlight the work of founders of museum education, and align the democratization of American museums during the Great Depression with the renewed focus on museums as serving the public through education. I discuss the impact of the Cold War on museum education as seen through the national focus on science and math, and on the increase in federal funding for museums. I explore a major advance in the museum education profession during the 1980's, when museums across the country shifted their focus from internally-centered curatorial displays to more publicly-focused institutions that included the voices of the surrounding community in the display and interpretation of exhibits. I review some of the wealth of literature that emerged in the 1970's 80's and 90's into how visitors learn in museums, the emergence of organized professional development and graduate programs intended to aid the field in achieving professional status, and the growth of national and international associations such as the Visitor Studies Association, the Education Committee of the American Association of Museums, and the Museum Education Roundtable to establish common sets of best practices, research, and knowledge base for museum educators, and I posit a theory about how such scholarship prompted the beginning of the new museum education movement.

In section two I delve into the newly emerging literature on the current state of the field of museum education, from the research into how museum educators perceive themselves, the pedagogy and goals of particular sets of museum educators, and the press

to move the field from an occupation to a profession. I consider the literature around best practices in partnership between museum educators and their stakeholders, and the impact that the museum education movement had on the field itself. I explore studies about the impact of the American economic recession on museum staff layoffs, and examine the current state of museum educator professional development. I explore the literature which examines a new future for museum educators, and discuss the dearth of literature surrounding the leadership of museum educators.

1786 – 1879: The American Museum Post the Civil War: The Idea of Museum as Public Place Emerges

In the years following the Civil War, museums were mostly collections of objects housed in private mansions and estates, and viewable only by the wealthy. Examples of museums prior to the late 1880's can be found, but they were, "often no more than a case of arrowheads or medical instruments" (Schwartzer, 2006, p. 8). While the nation's first public museum opened in 1786 when artist Charles Wilson Peale opened his home in Philadelphia to the masses, (Schwartzer, 2006, p. 8) none of these collections was made available for pedagogic purposes – a critical distinction between amusement during the late 18th and most of the 19th centuries and the didactic curatorial displays of the late 19th and early 20th centuries. Peale's museum, while founded on the idea that the arts would uplift the masses, included amusements which quickly diluted any instructional or cultural purpose. "By the 1830's, Peale's museum (now under the management of his sons) featured one-man bands, trained dogs, ventriloquists, and the obligatory freaks of nature" (Roberts, 1997, p. 24). The same could be said for other public museums of the

day, many of which included such attractions to draw in the masses in an effort to keep the doors open during times of economic hardship. One British gentleman touring the United States at the time summarized his experience in museums this way:

> In America, Museums are almost always the property of some private individual, who gets together a mass of everything that is likely to be thought curious – good, bad and indifferent – the worthless generally prevailing over the valuable. The collections are then huddled together, without order or arrangement; wretched daubs of painting, miserable wax-work figures, and the most trifling and frivolous things are added and there is generally a noisy band of musicians, and a juggler, belonging to the establishment, to attract visitors. Mere amusement, and that of the lightest and most uninstructive [sic] kind, is the only object sought in visiting them" (Roberts, 1997, p. 25).

1880 – 1920's: The Industrial Revolution and the American Museum: The Emergence of Museum Education as a Distinct Activity

Between 1880 and 1920 America experienced swift and unprecedented changes to its social, political, economic, and environmental landscape. During this time the population of the country exploded as thousands of immigrants seeking refuge arrived at Ellis Island. Cities like New York, Boston, Chicago and Philadelphia became home to an ever-increasing population of non-English speaking people. The Industrial Revolution in the States led to the development of an urban society, a rise in the middle class population, a growing number of poor immigrants, and, ultimately, to the creation of museums as instructive, democratic public spaces.

With such change came the notion that the United States would benefit economically from an informed citizenry. Marjorie Schwartzer, author of *Riches, Rivals, and Radicals, 100 Years of Museums in America*, wrote, "civic leaders in different cities

relied upon public schools and museums to help promote a cohesive set of moral values in their communities" (Schwartzer, 2006, p. 8). Scholars of museum history such as Neil Harris, professor of the University of Chicago, wrote, "It is difficult to overemphasize the stress [museums] placed upon their pedagogical functions some 100 years ago, and the benefits they promised for industrial production, scientific curiosity and historical consciousness" (Schwartzer, 2006, p. 8).

Not a coincidence, museums as public educational institutions arose at the same time that the progressive education movement in America began. The same philosophies which underpinned progressive education in school settings applied to museums, and many of the same progressive public school leaders were critical players in the shaping of museums. "More than anyone else, educational reformer and philosopher John Dewey helped to make education central to the museum's mission and greatly influenced the children's museum movement. Dubbing desks, blackboards and textbooks as "dull drudgery," he called on teachers to look beyond the schoolyard to create real life experiences for students who could "learn by doing" (Schwartzer, 2006, p. 9).

John Cotton Dana, founder and director of The Newark Museum, believed that museums must be of service to public education when he wrote, "The good school museum is a collection of lending objects useful in school work; prepared by a corps of workers who are in close touch with the schools; and forming part of a general public museum of art, science, industry, and history" (Peniston, Ed., 1999, p. 194). It is important to note here that Dana felt strongly that museums were not schools:

> A museum is not a school; it cannot afford to become a school; and by its own unaided powers it can do little educational work of the formal kind. Fortunately it has close at hand a multitude of educational institutions:

> schools – public, private, and parochial; universities, technical institutes; professional and business colleges. Cooperation of museums with them has been tried in many places to a moderate extent, notably in Newark, and always with fair success. The museum as an aid to teaching institutions of every kind seems to be in its proper position" (p. 198).

Dana's opinion on the matter flew in the face of social settlement workers like Jane Addams, founder of the first settlement house in the United States called the Hull House Labor Museum:

> There, the goal of the residents was not only, in Jane Addam's words, "to share the race, life, and bring as much as possible of social energy and the accumulation of civilization to those portions of the race which have little," but also to deepen the knowledge of the already well educated, first, by enriching it with the contributions of people from other ethnic, social, and religious traditions, and second, by testing it in a concerted effort to improve the living conditions of the poor. Addams and Starr may have begun in 1889 by reading George Elliot *to* the first visitors from the neighborhood, but they and their associates soon went beyond that to study Dante *with* their neighbors and eventually moved on to develop the sort of reciprocal interpretation that was essential to the purpose of the Hull House Labor Museum (Cremin, 1988, pp. 436-437).

In true American fashion, museums became grand illustrations of the democratic ideal, but that did not mean that such public institutions did not differ in context and philosophy. Some founders believed that American museums must emulate the Victorian European tradition; grand facades, ornate and imposing, suggesting that the public would be uplifted and cultured simply by walking through the doors. "The elites that established and developed these institutions – elites joining well-to-do philanthropists with an emerging class of professional humanistic and scientific scholars – had a clear education program in mind, one that envisioned the museums and libraries as great civilizing institutions that would place Chicago on a par with Renaissance Florence and contemporary London while also taming the turbulent Chicago population during a

period of ethnic, religious, class, and racial strife" (Cremin, 1988, p. 440). But others sought to bring culture to where the poorest people lived through more modest settings and more organic approaches:

> Jane Addams learned about the role of art in narrowing the gap between social classes from reading the Victorian novelist Walter Besant and the Victorian critic John Ruskin and from observing the work of the Victorian cleric Samuel A. Barnett at Toynbee Hall, but her efforts at Hull House placed her a world apart from her friend Charles Hutchinson on the matter of how art should be displayed, enjoyed, criticized, and experienced. Hutchinson located the Art Institute downtown and followed the cosmopolitan standards of Renaissance painting and sculpture in attempting to civilize and uplift the community; Addams located the Hull House Labor Museum in an immigrant neighborhood and sought to follow the indigenous standards of immigrant craftspeople in attempting to civilize and uplift the community. Hutchinson and Addams were both Victorians, but their Victorianism led them in profoundly different educational directions (Cremin, 1988, p. 443)

Early Museum Educators

The literature during this period (1880 – 1920) describing the emergence of the museum educator as a staff position is scant. "Histories of museums have typically focused on collectors, founders, and visionaries. Although education has been a cornerstone of many institutions, it has never received an adequate place in the historical record. It is only in this century, after all, that staff and departments devoted solely to education have begun to appear in museums" (Roberts, 1997, p. 1). While this research represents a gap in the literature, there is worth in examining historical visionaries who led their institutions with educational purpose in mind. George Hein examined two such educational pioneers at the helm of their respective museums: Anna Billings Gallup, a former classroom teacher who became head of the Brooklyn Children's Museum in 1903, and Louise Connelly, a former school superintendent-turned-educator at the Newark

Museum under John Cotton Dana. Both progressive educational leaders, Gallup and Connelly were examples of museum educators who promoted a less didactic approach and a more constructivist approach to the education of children.

> Anna Billings Gallup described the purpose of museums and museum education at the beginning of the 20th century when she wrote: "[We] must remember that the keynote of childhood and youth is action. Any museum ignoring this principle of activity in children must fail to attract them. The Children's Museum does not attempt to make electricians of its boys, not is its purpose to do the work of any school. The object is rather to understand the tastes and interest of is [sic] little people and to offer such help and opportunities as the schools and homes can not give (Hein, 2006, p. 167).

Prior to joining the Newark Museum as an educator in 1912 Louise Connelly, a general supervisor of grades 2-8 in Newark, New Jersey Public Schools in 1902, saw the immediate application of the museum in formal learning settings and asked that her administrative offices be located in the Newark Museum on the fourth floor of the Newark Public Library. Soon after taking up residence there, Connelly began incorporating the Newark Library and Newark Museum's resources into citywide annual essay contests. Upon returning to the Newark Museum in 1912, Connelly embarked on a nationwide tour of American museums to both share her educational ideas and bring back ideas she learned from her trip (Hein, 2006, p. 169).

Aside from accounts of these visionary leaders, there is little in the literature which describes the role of the museum educator in this period of museum history. According to Roberts (1997), the first museum staff "instructors" were hired as early as World War I. "Many of these early instructors were schoolteachers – a fact that would later hinder museum educators bent on differentiating themselves from the more formal education field. Nevertheless, they established educators' first professional niche in the

institution, which soon led to the formation of autonomous education departments" (Roberts, 1997, p. 33).

1920 – 1949: The American Museum After World War I: Museum Education Differentiated from the Field of Museum Curatorship

Despite the Great Depression, the period after WWI and leading up to WWII was a time of growth for the museum education profession. "There were approximately 600 [museums] in 1910 and some 2,500 when Laurence Vail Coleman published the first great survey of American museums in 1939 under the title *The Museums in America*. Most of the 2,500 museums had been established after World War I (Cremin, 1988, p. 450). According to a 1932 survey published in *Museum News* (which began publishing in 1924), "15 percent of U.S. museums offered organized educational programs" (Roberts, 1997, p. 33). There were an increasing number of articles appearing in the *Museum News* journal, and a growing research base emerging among museum educators and curators as to how museum visitors spent their time in the exhibits. Knowledge about the practice of museum educators began to be disseminated. "In her 1938 overview of education activities in U.S. Museums, Grace Fischer Ramsey devoted some two hundred pages to the description of museum lectures, talks for the blind and the deaf, teacher training, museum clubs, nature contests, field trips, extension work, and even radio programs" (Ramsey, 1938, p. 252). Ramsey suggested that "the pioneer period in museum educational work may now be considered as completed" (Ramsey, 1938, p. 43). Educators had indeed established themselves in the institution but Ramsey cautioned, "If

they were to continue to advance, the next stage of development required that they address their own training and promotion within the institution" (Ramsey, 1938, p. 43).

By the 1930's it became clear that museums were about to undergo yet another major shift in the way they operated. The Great Depression devastated philanthropic giving and as a result museums could no longer rely on the wealthiest citizens to underwrite operating costs. Even the Works Progress Administration, a federal program which infused billions of federal dollars into the arts, did not have a strand for museums. While thousands of Americans were able to find WPA jobs through a formally constituted library program, there was no such provision made for museums. "the difference probably testifying, first, to the public perception of libraries as public institutions whereas museums were still seen as essentially private, and second, to the large number of unemployed men and women who saw themselves as librarians in contrast to the relatively smaller number who saw themselves as museum workers" (Cremin, 1988, p. 463). Francis Henry Taylor, just before assuming the post of Director of the Metropolitan Museum of Art in 1939, addressed the membership of the American Association of Museums:

> We have reached a critical period in the American museum, as anyone confronted with a budget can tell too plainly. It is impossible for us to continue as we have done in the past. The public is no longer impressed with the museum and is frankly bored with their inability to serve it. The people have had their bellyful of prestige and spending of vast sums of tax-levied or tax-exempted funds for the interest and pleasure of the initiated few. We must stop imitating the Louvre and the Kaiser Fredrich and solve this purely American problem in a purely American way (Cremin, 1988, p. 453).

Here the sense of urgency for the museum was made clear. The museum as institution was confronted with the same relevancy challenge it faces today:

become relevant and therefore valuable to the public, or die. Consequently, the now century-old debate about scholarship vs. the popularization of the museum had finally reached its boiling point. The friction between curators and this new breed of museum worker, the educator, could not be ignored by museum directors (drawn in large part from the ranks of the curators) and trustees. The newly formed education departments in museums sat alongside, but in direct contrast to, curatorial departments. Theodore Low argued it best in 1942 when he articulated the friction between the different phases of activity a museum encompasses. In responding to a definition for "museum" provided by Paul M. Rea which reads:

> The acquisition and preservation of objects, the advancement of knowledge by the study of objects, and the diffusion of knowledge for the enrichment of the life of the people (Cremen, 1988).

Mr. Low argued that on paper these three functions appear as equals when in fact they are not. Museum directors, curators and trustees placed the priority on the collection and preservation of objects above all else. The second priority was scholarship, but such scholarship was intended primarily for the highly educated and not for the masses. In a time of economic desperation museum directors were forced to acknowledge that education for all its citizens must be the first priority of museums if they are to survive. And yet, a retrofitting of museum education departments into an existing structure only heightened the tensions between departments:

> And it has become the hallowed practice among all institutions to permit the educational department to be the legitimate tail to wag the rest of the dog. Thus, having paid a certain half-hearted tribute to the public welfare,

> they could turn to the more exciting pleasures of collecting and exposition (Anderson, 2004, p. 32).

1950 - 1959: American Museums During the Cold War: The Birth of the Science Center

By the 1950's the Cold War and McCarthyism forced museums to change in ways that ran counter to the growing museum education movement. "Fear of attack by the Soviets prompted museums to shift their focus from reaching out to the public community to concerns about the collection, their storage, ventilation and security" (Schwartzer, 2006, p. 17). McCarthyism brought about the blacklisting of artists, a more conservative approach toward exhibitions, and an overall conservative shift in the mood of the country. By 1955 progressive education in public schools was seen as a thing which had come and gone. With the establishment of the National Science Foundation in 1950, federal support for programs and curriculum that fell outside the subjects of science and math waned.

In 1957 the country was issued a new challenge: Put a man on the moon. The space race had begun. It also prompted the birth of a new kind of museum. The St. Louis Science Center, the first museum of its kind in the country, opened in 1959 and prompted a debate that would last for decades: What is the definition of a *Museum* and are places like science centers and planetariums even museums in the first place? In a time when museum educators could have been bandied together to make a case for democratic museums broadly defined, they were instead separated into discipline-specific realms: Art museums, natural history museums, children's museums, historic sites, science centers, zoos and aquaria.

In the struggle for relevancy, museums began to reach out to new audiences by experimenting with radio and television programs, including *What in the World*, from the University of Pennsylvania's Museum of Archaeology and Anthropology, where viewers sent in mysterious artifacts for museum director and curator Dr. Froelich Rainey and a panel of curators to identify. *Zoo Parade*, the precursor to the nationally syndicated show, *Mutual of Omaha's Wild Kingdom*, also premiered in 1952.

1960-1989 The Civil Rights Movement: A Research Agenda for Museum Educators Emerges

The 1960's heralded a shift in museum focus with renewed effort to reach out to more diverse audiences. Public protests against the Vietnam war, marches for civil rights, the beginning of the education reform movement in public schools, and sweeping changes to the social fabric of the country ran counter to the "collect, preserve and protect" stance held by museums in previous decades. During this period and in response to the progressive mood sweeping the country, museums were called upon to display exhibitions which represented immigrant, minority, and underserved populations. Museums, however, had much to learn about how to better relate to the public through exhibitions. One such example can be seen in the 1969 Metropolitan Museum exhibit, "Harlem on My Mind: The Cultural Capitol of Black America." The public decried the exhibit, calling it paternalistic and racist; the exhibition did more to demonstrate the huge gap in understanding between museums and the public than it did to increase museum relevancy. In response to her viewing of the exhibit, poet June Jordan wrote:

> Take me into the museum and show me myself, show me my people,
> show me Soul America. If you cannot show me myself, if you cannot

> teach my children what they need to know – and they need to know the truth, and they need to know that nothing is more important than human life – If you cannot show and teach these things, then why shouldn't I attack the temples of America and blow them up? (Schwartzer, 2006, p. 20).

Federal Support for Museums

The federal government formed the National Endowment for the Arts and the National Endowment for the Humanities in 1965, which opened-up federal funding opportunities for museums. In 1968 the Federal Committee on Arts and the Humanities was formed and published *America's Museums: The Belmont Report* (Robbins, 1968) that outlined the future of federal support for museums. The Institute of Museum Services (precursor to the Institute for Museum and Library Services) was founded in 1976. "During the 1970's federal funding gave rise to hundreds of community outreach projects – partnerships between museums and senior centers, hospitals, prisons and juvenile justice halls" (Schwartzer, 2006, p. 21).

The 1970's saw a boom of museums: Thanks to increased state and federal funding, the inclusion of funds for museums as part of urban renewal plans, a growing number of doners and members, and an all-time high visitation rate, more than 3,200 museums were founded between 1970-1989 (Schwartzer, 2006, p. 22). Some, including Alma Wittlin questioned the quality of museums in a time of such quick expansion. "Let us call a moratorium on the expansion of buildings and on the acquisition of additional gadgetry until we know more about the benefits people derive from what is going on in museums. Do we always know what kind of misfits are created in addition to institutions of excellence?" (Wittlin, 1970,p. 216).

A Research Agenda for Museum Education Emerges

Prior to the mid-1970's, exhibit designers and curators spent time researching visitor demographics and visitor behavior in exhibitions, but little emphasis was spent on the learning outcomes of museum visitors. Concurrent with increased numbers of museums, increased funding from the state and federal governments, and an emphasis on community connections, the field of museum education experienced a strong period of growth in the area of scholarship during the late 1970's and throughout the 1980's. Drawing initially on the field of educational psychology, museum education played a role in helping museums to understand how visitors learn from exhibits and programs.

New definitions of museum literacy were formed, new frameworks for evaluating programs and exhibits were developed, new guidelines for tours emerged, new ideas on professional development in museums were put forth, new recommendations on how best to partner with schools and teachers were made, and new organizations such as the Museum Education Roundtable (MER), the Education Committee of AAM (EDCom) and the Visitor Studies Association (VSA) were formed. Both MER and VSA published academic journals specifically for the museum education profession.

In an early issue of the *Journal of Museum Education*, Falk and Dierking (1984) called for museum education to focus its research agenda specifically on *museum learning* as it differentiates itself from *school learning.* Further, these authors called for museum educators to shift the research from a quantifiable evaluation of what was and was not learned on any given museum visit to a larger understanding of "why visitors come to museums, and how they use the information they glean from museums in their future lives" (p.12). Munley (1984) urged museum researchers to distinguish the

difference between “evaluation,” “audience research,” and “education research” (p.3) and develop a conceptual direction for each.

The emphasis museum education placed on its research agenda throughout this time period was focused on ascertaining how visitors learn in museums, the outcome of which was to build better exhibits, programs and relationships with visitors. Still missing from the dialogue, however, was a research agenda into the teaching practice of museum educators themselves.

Museums Look Toward the New Century

In true Orwellian fashion museums were looking toward the future in 1984. The American Association of Museums, responding to the need to prepare for the 21st century, commissioned a report from its leadership. *Museums for a New Century*, laid the groundwork for the next generation of American Museums. Of the sixteen recommendations the report put forth, one-third of them called for museums to recognize their full potential as educational institutions and serve the widest possible public:

- Recommendation 5: Education is a primary purpose of American museums. To assure that the educational function is integrated into all museum activities, museums need to look carefully at their internal operational structures.
- Recommendation 6: We urge a high priority for research into the ways people learn in museums.
- Recommendation 7: AAM and other professional education and museum organizations [should] begin an effective dialogue about the mutually enriching relationship museums and schools should have.
- Recommendation 8: We urge that museums continue to build on their success as centers of learning .and pay new attention to their programs for adults.
- Recommendation 10: Museum work merits professional compensation. We urge that each museum develop responsible compensation policies and practices that bring its salaries and benefits into line with professional work for which similar education and experience are required.

- Recommendation 11: We strongly believe the museum community must address the underrepresentation of minorities in the museum work force generally and the underrepresentation of women in the higher levels of management. (American Association of Museums, 1984, pp. 31-35).

The report goes on to caution the field that museums, if they are to survive in the 21st century, must "adequately and aggressively promote the significant contribution museums make to the quality of the human experience," and that the "economic situation in museums is extremely fragile" (AAM, 1984, p. 29).

1990-2000: The Information Age Begins: Thought Leaders Guide Museums Educators to the 21st Century

With the 21st century upon them, the American Association of Museums commissioned a task force of museum education leaders to build on the recommendations put forth in the *Museums for a New Century* report, the result of which was a groundbreaking policy statement on the educational role of museums in America. *Excellence and Equity: Education and the Public Dimension of Museums* (American Association of Museums, 1992), issued the following as its first principle recommendation: "Assert that museums place education in the broadest sense of the word at the center of their public service role" (p. 8). This recommendation, along with the nine other recommendations, had enormous implications for museums large and small and of every type. Up to this period, the first priority of American museums was clearly the accumulation and preservation of its collections. With the release of *Excellence and Equity*, however, the authors took a bold step to state that "the educational role involved the entire museum — from trustees to guards in the galleries, from public relations staff to docents who give tours, from curators, to educators" (p.4). To that end, the report

offered clearly articulated strategies related to learning, interpretation, scholarship, collaboration, and professional development for everyone in the museum from the boards of trustees to the staff and volunteers. The report also stressed the need for museums to reach the broadest public dimension by becoming less an ivory tower and more a community center – an "integral part of – rather than adjunct to – the multifaceted human experience" (p.17).

So what was the impact of this report on the museum education profession? In an article for the *Journal of Museum Education* in 2009, I argued that, while the intent of the policy was right, museum educators did not lead the way. "Instead of playing a leadership role in building the capacity of others to do this work, the job of the average museum educator became blurred with customer service. They often became front line staff instead of highly valued resources in achieving a new public dimension for their museums" (Nolan, 2009, p.118).

The 1990's were a prolific time for literature related to the future of museum education; it was a time in which many of the profession's thought leaders emerged. These individuals did not cross-over from schools or libraries as Anna Billings Gallup or John Cotton Dana had done. These were individuals who spent their careers working in, with and for museums, and they helped to define the profession we see today. Take, for example, Stephen Weil. Dr. Weil, who passed away in 2005, was a mentor for many of the individuals who are emerging thought leaders in today's profession. A prolific writer and senior professor emeritus at the Center for Museum Studies, Smithsonian Institution, Dr. Weil authored such books as *Making Museums Matter* (2002), and *Rethinking the Museum and Other Meditations* (1990). In one of my favorite articles, written in his 1995

collection of essays in the book, *Cabinet of Curiosities: Inquiries Into Museums and Their Prospects*, (1995) Weil urges museums to prepare for economic hardships by asking the hardest questions: "Are you really worth what you cost or just merely worthwhile? Could somebody else do as much or more than you do for less?" (Weil, 1995).

I would be remiss if I did not mention the work of George Hein, one of the most well known researchers examining visitor learning in museums. Hein wrote and researched extensively about exhibit design and visitor outcomes, and created frameworks for other researchers to utilize. The author of *The Museum Experience* (1998) and *Learning in the Museum* (1998), Hein conducted some of the first formal research into constructivist exhibition design.

Other thought leaders include John Falk and Lynn Dierking, Founders of the Institute for Learning Innovation. Together, Drs. Falk and Dierking led the science museum field to a better understanding of how to assess visitor learning and the impact of science museums on visitor's everyday life. They also coined the phrase "free-choice learning," which is now common terminology for the science museum educator. Together and as individuals they have authored countless articles and several books on the topic of visitor learning in science museums, some of the most notable include: *The Museum Experience* (1992), *Learning from Museums: Visitor Experiences and the Making of Meaning* (2000), and *Public Institutions for Personal Learning: Establishing a Research Agenda* (1995).

Other prolific writers/practitioner-researchers include Mary Ellen Munley and Randy Roberts who during the last decade of the 20th century examined the public value

of museums and pioneered strategies for museums to involve the community in reciprocal relationships. Beverly Sheppard articulated what works in museum and school partnerships, while Lisa C. Roberts (1997) documented the beginning of the movement of museum education towards realizing a professional status.

By the end of the decade several books were published which examined the future of museums, not the least of which was edited by Bonnie Pitman, Chair of the *Excellence and Equity* task force and well-known museum leader. In her book, *Presence of Mind: Museums and the Spirit of Learning*, (1999) she asked the contributing authors to anticipate the most critical issues museums must face in the 21st century. Of the issues addressed, there were several which were examined in more than one chapter, and all of which required leaders who are rooted in education: museum relevancy and the public value of museums, museums as places for continuing education and lifelong learning, museums that can create sustainable relationships as active community partners, and museums that can and should play a role in social responsibility. Some of the most compelling issues related to my area of study included Alberta Seabolt George's call for museum leaders "who can look outward, engaging the community to achieve a new level of public involvement, while nurturing critical thinking and rigorous scholarship. Leaders must not only manage change, but must get ahead of the change process" (George, 1999, p. 39). George also called upon museums to bridge the gap between "the museum as environment and the visitor as learner" (p. 41). In the same publication Patterson Williams called for an end to the educator vs. curator turf war and wrote, "Educators and curators, with their wonderful difference in values, temperament, and even the kinds of intelligence they bring to the table, should work hand in hand and on absolutely equal

footing to make collections more accessible to a broader public" (Williams, 1999, p. 65). And Zora Martin Felton highlighted the gap in the research into how museum educators teach when she wrote, "As we move into the next century, it will be more and more difficult for museum educators to be effective without a thorough grounding in what EdCom has identified as "practice" in its *Goals 25* (1995) action plan. . . How seriously we take the task of teaching and learning – as well as listening – will determine our chances for survival as a profession" (Felton, 199, p. 73).

2001-Present: The Current State of the Museum Education Profession

To date the literature on museum education in the 21st century continues to provide new insights into visitor learning in museum exhibits, through museum programs, and from museum visits.

However, until the beginning of the 21st century there was very little research into how museum educators performed their work. The beginning of this century denotes the emergence of a new strand of research in American museums: The practice of museum educators themselves. Christine Castle saw a niche to be filled when she completed her dissertation in 2001. Castle's research (2001) led her to conclude that museum educators are in need of more formal structures for professional development and training, adding, "Museum teachers would benefit by a more concerted and thoughtful approach to their training and continuing professional education. This curriculum could strive to bridge the gap between formal theories of the disciplines, museology, education, and what Schon (1981) calls the "phenomenology of practice" (Castle, 2001, p. 322) through reflection upon and analysis of museum teaching" (p. 327). Castle cautioned, however, that such training and professional development must take into consideration the constraints facing

museum educators, such as time, diversity of audiences, and scope of work. Castle's continuing work has since revolved around the creation of an online clearinghouse for the profession which captures the most recent online discussions, published research and new studies, literature and workshops available for the profession in her online newsletter, called the Museum Education Monitor. (http://www.museum-ed.org)

Another study was conducted by Elsa Bailey, whose 2003 dissertation yielded information on the current capacities of science museum educators in Massachusetts. Her study involved conducting interviews and observations and collecting written reflections from fifteen museum educators. Bailey concluded that the most important factors museum educators feel aid them the most in their professional growth are:

> …self-direction in learning; high motivation to participate in and learn museum work; job-embedded experiential professional learning; apprenticeship, mentoring, and peer learning opportunities; a community and culture that values and supports the social, contextual, and collegial aspects of learning; organizational structures and leadership that support professional growth and are attuned to its experiential and sociocultural aspects; and an interrelated network of communities of practice that provide support for and access to resources (Bailey, 2003, p. 1).

Lynn Tran noted the lack of research into how educators teach in science museums, and conducted her 2005 doctoral investigation by analyzing how educators who taught one-time lessons in science museums adapted their instruction to the students, how time limitations affected their instruction, and how perceived variability in entering student knowledge affected instruction (Tran, 2005, p. 2). Here are her findings, summarized for this review:

1. Museum educators increased their comfort and fluency with lessons as they repeated them
2. Delivery of science content to students varied

3. Museum educators are lifelong learners, which formed the basis for their approach to teaching
4. Museum educators adapted or refined their teaching strategies to accommodate limitations with time
5. Museum educators used chaperones to maximize instructional time

Tran's findings led her to conduct and publish more research into the practice and pedagogy of science museum educators. In 2006, Tran published findings that speak to the complexity of teaching in science museums:

> The data revealed that, contrary to depictions in the research literature of teaching in museums as didactic and lecture oriented, there was creativity, complexity, and skills involved in teaching science in museums. Finally, the educators' teaching actions were predominantly influenced by their affective goals to nurture interests in science and learning. Although their lessons were ephemeral experiences, these educators operated from a perspective, which regarded a school field trip to the science museum, not as a one-time event, but as part of a continuum of visiting such institutions well beyond school and childhood (Tran, 2006, p. 278).

In 2007 Tran and her colleague Heather King sought to provide a framework to ground the professional work of science museum educators. Their framework consisted of six components: context, choice and motivation, objects, content, theories of learning, and talk, which were organized into three domains of knowledge: museum content knowledge, museum pedagogical knowledge, and museum contextual knowledge (Tran & King, 2007, pp. 131-149). Tran and King drew from a wide range of museum literature and led focus groups to identify the components which distinguish museum education work from school work or curatorial work. They then conducted research on how museum educators succeeded in each component using the three domains of knowledge listed above.

Drawing from the sociological literature on the topic of professionalization and their findings utilizing the framework they created, Tran and King argued that the field of

museum education has not fully professionalized, but is currently categorized as an occupation. (Tran & King, 2007, p. 278). They defined the two concepts, occupation and profession, this way:

> Occupations represent the organization of productive labor into the social roles by which tasks are performed, (Freidson 1994, 82) while professions are the exclusively organized occupational groups whose members share a common occupational identity and commitment, and also have control over what their work is and how it is done (Freidson 1994; Larson 1977 as cited in Tran & King, 2007, p. 278).

2008 yielded more research from Tran and King when they sought to identify how museum educators characterized their work, and how they organized their work. Their findings, published in the *Journal of Museum Management and Curatorship*, concluded that museum educators in these settings lacked a common technical language for their practice, but that they shared common conceptions about their work. They also concluded that the lack of a common technical language may stem, in part, from the diversity in museum educator backgrounds and training. Perhaps most compelling, however, is their argument that the way museum educator work is organized is impeding the field of museum education from professionalizing. They argue that the "assembly line" approach of developing and delivering services prevents autonomy for educators and that the outsourcing of work such as program evaluation devalues the profession (Tran & King, 2008, p.131).

In 2009, in preparation for this dissertation, I conducted a pilot study looking at the extent to which museum educators believed their departments operated as learning communities. I built upon the research conducted by Castle, Bailey, Tran and King, and drawing upon Peter Senge's definition of learning organizations:

> …a learning organization [is] an organization that is continually expanding its capacity to create its future. For such an organization, it is not enough to merely survive. "Survival learning," or what is more often termed as "adaptive learning," is important--indeed it is necessary. But for a learning organization, "adaptive learning" must be joined by "generative learning," learning that enhances our capacity to create (Senge, 2007).

I created an attitudinal survey in which museum educators were asked to rate the degree to which they agreed or disagreed with a set of best practices in teacher learning and professional development (Appendix A). They were also asked to rate the degree to which they participated in and used data to drive interpretive, program and/or exhibit development. The response to the survey was high; I received 144 responses in one week. Statistical analysis of the results yielded the following about the respondents:

1. Museum educators are highly collaborative in their work
2. They base curriculum development on data received from program evaluation
3. They are involved to some extent in program evaluation, however by and large that program evaluation is led by someone else
4. A majority of those surveyed do not read the current literature about museum education
5. A majority of those surveyed do not write about their work in scholarly or practitioner-based journals

What I found most interesting in my findings was the data which revealed that common sets of best practices in museum educator professional development my not yet exist. While such standards may exist for school-based educators, those same standards do not directly apply to those who teach in non-school settings.

In 2008 the United States entered into a recession the likes of which this country had not experienced since the Great Depression of the 1930's. Museums were not spared the impact: endowments shrank, philanthropic giving decreased, federal and state programs were cut, travelling exhibitions were cancelled, museum expansion efforts were stalled, and staff positions were frozen. According to a survey completed by Ron Kley, of the

New England Museum Association's affinity group, Independent Museum Professionals, the majority museum professionals surveyed who lost their jobs as a direct result of the economic downturn came from the ranks of education (Kley, 2009, pp. 123-128).

In a 2009 issue of the *Journal of Museum Education* I begged the question; do museum leaders believe that educators are expendable? (Nolan, 2009, p. 117). Probing further as guest editor for this issue, I organized a series of articles around the following questions:

- What will it take to reposition museum educators from the margins of our institutions to the center?
- Why and how must museum education departments change, and who can affect such change?
- What should a museum education department leader know and be able to do in order to affect change?
- What are the ramifications of change leadership for the rest of the institution?

In this issue I provided a working description of an educational leader in a museum, and it is one that I have since revised as a result of the research phase of my dissertation:

> An educational leader is one who understands the practice and pedagogy of museum educators. They understand leadership principles such as organizational culture change and systems thinking. They have reflected deeply on their core values and stand by them, and they know how to mobilize others to lead. An educational leader knows how best to manage staff, but also understands that management is only one part of a much larger job. An educational leader places the highest value on the educational mission of the institution, endeavors to be the lead-learner, and is unafraid of taking risks and leading change (Nolan, 2009, p. 172).

In this issue I highlighted the experiences of museum educators who had leadership thrust upon them, learning how to lead on-the-job. I asked museum thought leaders such as Mary Ellen Munley, Randy Roberts, and Leslie Bedford to comment on their view of the future of the profession. I asked recent graduates of the Bank Street Museum Leadership Program to provide examples of tools and strategies that they use

with their staff. And I asked Mary Kay Cunningham to convene focus groups with colleagues from across the country to envision a new future for museum educators and comment on the skills and dispositions they will need to assume leadership for the field:

> Museum educators must seize this opportunity to leverage our knowledge of learning and experiences with visitors to make ourselves indispensible in this time of change. If we are to remain relevant and continue evolving, it is not enough for educators to focus on advancing our skills as facilitators of quality learning experiences. We must also consider how our particular expertise qualifies us for leadership roles while museums prepare to transform themselves into responsive institutions that customize visitor experiences. (Cunningham, 2009, p. 164).

I also discussed the need for museum educators to understand principals of change leadership, recommending sources from outside the typical museum literature like Senge's *The Fifth Discipline* (1990), Collins *Good to Great and the Social Sectors* (2005) and Bolman and Deal's *Reframing Organizations: Artistry, choice and leadership* (2003) as starting points. I recommended that museum educators look to the literature about change leadership, specifically in places of learning, to find ways to adapt what works in schools for use in museums. Fullan's works, *The Six Secrets of Change: What the best leaders do to help their organizations survive and thrive* (2008), and *Leading in a Culture of Change* (2001) offered an analysis of the change process itself in relation to learning, and Wagner's *Change Leadership: A practical guide to transforming our schools* (2006) extended this idea by connecting the concepts of change leadership, learning, and systems thinking together.

All of the sources I recommended in the journal came from my experiences in the doctoral program. Further examination of the museum literature yielded scant sources dedicated to understanding and affecting organizational change, save for Suchy's *Leading With Passion: Change management in the 21st century museum* (2004). Suchy's

book, which stemmed from her Ph.D. research in 1998, was a case study of change leadership frameworks specifically designed for the museum setting. Suchy's motivation for engaging in this work was directly aligned with a trend she saw among the leadership of museums:

> When the director for the National Gallery of Australia retired in the late 1990's, it took nearly three years to locate a new director. . . The pool of people willing and able to take on directorship roles in museums was actually shrinking in the 1990's while the number of museums expanded. It seemed that potential candidates were aware of increasing job complexity around the director's role and were comparing this to what they had been trained in and actually liked doing. People were self-selecting out of leadership career paths just at the time the leadership candidate pool needed to be expanding (pp. 4- 5).

While Suchy's work attends to museums as a specific context for organizational change, her perspective is that of the museum director or president. What, then, of the other professionals in the building, like the museum educators themselves?

The Future of Museums in America

It is clear from the literature that a new movement in museum education (and museums in America) has begun. There is plenty of opportunity for the creation and testing of frameworks, tools, and strategies all in the name of building the capacity of museum educators to lead museums to a new future. My research into how museum education became a career choice led me to a solid understanding of how far American museums have come in a relatively short span of time.

Themes emerged throughout this review: Museums, born out of the collections of the wealthy, became democratic expressions of America, but even those expressions were dichotomous. For some, museums were meant to uplift and civilize the masses; for others, museums existed as vehicles to advance social justice issues and empower the

public. Museums moved from an internal focus on collecting and preserving, to an external focus that included the voice of the public in the exhibits, to a community focus that involved the public as co-authorizers of programs and exhibitions (Scott, 2010, p.39). With each shift in focus and mission, the museum educator role was further defined. As the museum educator role became critical to the value of museums, understanding how visitors learn in museums became the core focus of research for the profession. The most current literature shows that the research agenda, too, has matured and today's questions include understanding the practice and pedagogy of museum educators.

I have now begun to look ahead at what the future holds for American museums. Not only has the research into visitor learning matured, but the practice of museums appears to be shifting to reflect the changing and more networked nature of our society. In Lois Silverman's latest book, *The Social Work of Museums* (2010), she argues that museums are becoming institutions of social change:

> Increasingly, museums are turning their social activism inward to effect mush needed change by redressing the exclusion and/or misrepresentation of historically excluded groups like people with disabilities and lesbians and gay men. Altering the very perspectives from which museum professionals approach their work can be seen as an important strategy for addressing cultural and social exclusion (location 681 of 6295).

Nina Simon wrote her first book in part to respond to a 2009 study conducted by the National Endowment for the Arts that shows, "over the last twenty years, audiences for museums, galleries, and performing arts institutions have decreased, and the audiences that remain are older and whiter than the overall population" (http://www.nea.gov/research/2008-SPPA.pdf.). In Simon's book, *The Participatory Museum* (2010) she presents a framework for engaging the entire institution around "inviting people to actively engage as cultural participants, not passive consumers" (p. ii).

My motivation for understanding the practice of educational leaders in museums stems from my fears about the current state of the public education system in America and the impact of this broken system on the future of museums. For example, schools in the United States are suffering as a direct result of the economic recession that still grips this nation. Teacher unions are at risk, which ultimately means that students are at risk. Further, the demographic shifts in the States are increasing exponentially. According to a 2010 report conducted by the Cultural Policy Center at the University of Chicago and released by the Center for the Future of Museums (http://futureofmuseums.org/reading/publications/2010.cfm), in less than fifteen years, Caucasian children will be the minority. When you couple this information with the fact that, according to that same report, currently minorities make up less than 9% of the museum-going population in this country (2010), what will that mean for museums inside of the next 20 years? Further, according to the National Endowment for the Arts study (2009), the more education one achieves, the more likely one will be to actually visit museums and participate in cultural activities as an adult. If the public school system is broken and graduation rates keep dropping, fewer and fewer minorities who make up more and more of the US population will visit museums and participate in cultural activities. The future of American museums us unclear, yet there is ample opportunity for museum educators to guide museums in this new century.

Conclusion

My review of literature began with two central questions: How and when did the field of museum education begin? How has the profession evolved? I could not have arrived at those questions without first being exposed to the literature assigned

throughout my graduate and doctoral programs. I explored topics such as curriculum studies, school finance and budgeting models, teacher action research, organizational change, and political spectacle from both the school and business perspectives. Doing do enabled me to intentionally turn my gaze to the museum education profession armed with a depth of knowledge and understanding I would not have been able to bring had it not been for my coursework. In fact, one framework I encountered during the course of study became a starting point for me in examining the current state of the museum education profession. Drawing on Tony Wagner's "As-Is/To-Be" framework (Appendix B) I set about more formalized investigations of the field by probing deeply into the context, culture, conditions and competencies of museum education leaders. In Chapter Three I present the methodology I chose for this dissertation and include a discussion about how Wagner, Senge and Danielson informed my study.

CHAPTER THREE

METHODOLOGY

Introduction

Charmaz (2006) has traced the rise of grounded theory methods from Glaser and Strauss's work in 1967 which "defended qualitative research and countered the dominant view that quantitative studies provide the only form of systematic social scientific inquiry" (Charmaz, 2003, p. 509). In other words, "grounded theory methods consist of systematic inductive guidelines for collecting and analyzing data to build theoretical frameworks that explain the collected data . . . Throughout the research process, grounded theorists develop analytic interpretations of their data to focus further data collection, which they use in turn to inform and refine their developing theoretical analyses" (Charmaz, 2003, p. 509).

While the writing of Glaser, Strauss and Strauss's collaborator Corbin have "moved the method in somewhat conflicting directions (Charmaz, 2003, p. 510) during the last four decades, pioneers continue to "[assume] an objective external reality, [aim] toward unbiased data collection, [propose a set of technical procedures, and [espouse] verification" (p. 510). Charmaz, on the other hand, has proposed "another vision for future qualitative research: constructivist grounded theory" which "reaffirms studying people in their natural settings" (p. 510). The following summary amplifies the two positions:

> Grounded theory serves as a way to learn about the worlds we study and a method for developing theories to understand them. In the classic grounded theory works, Glaser and Strauss talk about discovering theory as emerging from data separate from the scientific observer. Unlike their position, I assume that neither data nor theories are discovered. Rather, we

> are part of the world we study and the data we collect. We *construct* [emphasis hers] our grounded theories through our past and present involvements and interactions with people, perspectives, and research practices. My approach explicitly assumes that any theoretical rendering offers an *interpretive* [emphasis hers] portrayal of the studied world, not an exact picture of it (Charmaz, 2006, p. 10).

Through her discussion of positivist and constructivist epistemology, Hinchey (2010) helped me "situate" my study within the paradigm of constructivism. "For the constructivist," she states, "it is the *meaning assigned to facts* [emphasis hers], rather than the facts themselves, that matters when we talk about *knowledge,* about *knowing* something" [emphasis hers] (p. 39). She further clarifies that "'Knowledge' is not something existing independently in the world just waiting for us to find it; instead, 'knowledge' comes into being only when a human being examines data (facts, artifacts, etc.) and assigns meaning to it" (p. 40). In summary, the constructivist "insists that 'knowledge' is *constructed by* [emphasis hers] human beings when they assign meaning to data . . . . No one 'knows' anything until he can add separate bits of data up into a coherent, meaningful picture for himself" (p. 42). Much like my approach to teaching, where I believe people learn to construct new knowledge that builds on or includes knowledge gained from prior experience, my approach to grounded theory research is constructivist:

> A constructivist approach to grounded theory incorporates building a relationship with respondents that permits them to present their stories in their terms. Asking respondents to expand on their use of a term allows for a clarification of the meaning they ascribe to the term. The assumption of the researcher is therefore reshaped by learning how the respondent applies the terminology within his/her lifespace and experience (Charmaz, 2003, p. 510).

Charmaz cautions that the constructivist nature of grounded theory is not intended to draw any final conclusions, but should be left open-ended, inviting the research to be extended continuously:

> Constructivist grounded theory remains aware of the fact that the viewer creates the data and analysis of those viewed through interaction. Causality is suggested and not considered complete. The theory seeks conditional statements on how those who are studied view reality, but they are not considered generalizable. Instead, they provide concepts that other researchers can carry into other research problems (Charmaz, 2003, p. 524).

Grounded theory, then, "redirects qualitative research away from positivism" (Charmaz, 2003, p. 510). In conducting the study, then, I have followed Charmaz's (2006) approach to conducting grounded theory, viewing "methods as a set of principles and practices, not as prescriptions and packages" (p. 9).

A Grounded Theory Researcher is Born

From the beginning of my research in 2005, my research was non-linear. "Our grounded theory adventure starts as we enter the field where we gather data . . . A grounded theory journey may take several varied routes . . . (Charmaz, 2006, p. 13). Research topics aligned with the topics addressed in my coursework. For example, while learning about school-based budgeting I read museum-related literature on budgeting models in addition to the course literature. I also conducted informal interviews with museum educators where we discussed the budgeting models they used. Concurrent with coursework I began editing the *Journal of Museum Education (JME),* a peer-reviewed, professional journal, and delved into topics such as cultural proficiency in museums, defining public value in museum education, and the nature of school and museum partnerships. Each quarterly issue of the *JME* gave me opportunities to reach out to a

national and international audience of museum educators, museum researchers, independent museum consultants, and museum-studies faculty. In my courses and my work with the *JME*, I honed my ideas, probed for more questions, and unearthed more data. Out of this work I began to form theories which I constantly (but informally) compared to the data I collected during my course of study. All the while, I was attempting to understand the phenomenon of leading education departments in museums. I also knew that my own perceptions of museums, leadership, and education helped to shape the questions I raised. What I did not have was a thorough foundation in a particular qualitative research methodology within which to frame my examination.

According to Bailey, "Qualitative research is a process in which three fields of activity interface. One is the researcher him/herself with his/her backlog of experience, values, beliefs, and ways of knowing. Another is the framework within which the study is undertaken, including the researcher's interpretive community and the subsequent questions it generates. And third is the methodology the researcher chooses to use to explore the questions under examination" (Denzin & Lincoln, 2000, p. 24). Additionally, as Merriam explains, "Qualitative researchers are interested in understanding what those interpretations are at a particular point in time and in a particular context" (Merriam, 2002, p. 4). What I did not know at the time was that I was using the ideas that underpin grounded theory methodology as I progressed through both programs. I did not approach data collection seeking out answers to formalized research questions. Rather, I let the data I gathered lead me toward emergent ideas or theories which then informed my decision about where to look next for information. Through my writing both for the

coursework and in my professional writing for the *Journal of Museum Education*, I constantly compared data throughout my experiences in this phase.

Table 2 below is a timeline of all papers I wrote in both the graduate and doctoral program and provides a snapshot into how my research agenda developed:

Table 2

Papers submitted throughout graduate study

Course	**Date**	**Paper Title**
EDL 553	**Summer 2006**	
	July	Reflections on Past Supervision Experiences
	July	The Evaluation Cycle and Defining Good Teaching
	August	Teacher Training Workshop Observation
	September	Family Program Observation
	September	Clinical Supervision in a Science Museum and a Nature Center
	September	The Danielson Framework and its use for educators in non-school settings
EDL 510-512	**Fall 2006**	
	September	Personal Vision: Museum Education Departments
	September	Reflections on leadership from Martin Luther King to Donaldson
	October	Interview #2: Vice-President of Education and Conservation at a Midwest Aquarium
EDL 506	**Winter 2007**	
	March	Integrity, Trust and Support
	March	Unions & Museums
EDL 546 & ESR 508	**Spring 2007**	
	April	NCLB and Museums
	May	Museums and Educational Equity
	May	Interview with Elsa Bailey, "The Professional Relevance of Museum Educators"
	May	The State of Museum Education/Case Study
	May	Museum Educator Identity and Practice
EDL 551	**Summer 2007**	
	June	Museum Educator PD
	July	Review and Critique Of a Museum PD Plan
	July	Museums and the Continued Struggle for Relevancy

	July	Redesigned PD Plan for Museum Educators
EDL 502	**Summer 2007**	
	August	Education Policies and International Policies for the Collection and Preservation of Exhibits and Species
EDL 501	**Intersession 2007**	
	November	Interview with two Museum Education Vice-Presidents
	December	Perspectives on School and Museum Finance
	December	Short Annotated Bibliography Museum Finance and Business Models
	December	IMLS Museum Services Act
	December	Interview Transcripts Vice-Presidents of Education at Midwest Museums
	December	EdCOM Museum Education Principles and Standards
	December	AAM Accreditation Program Standards
	December	AAM Expectations Regarding Institutional Planning
	Fall 2007	Graduate School Written Statement
EDL 504	**January 2008**	
	January	School-Museum Partnerships Literature Review – Boundary Spanners, School-University Collaboration.
	January	Review of Education Partnership Organizations NNER, Holmes Examination of NCATE Standards
	January	Case Study of Partnership Evaluation System
	January	Case Study Museum University Partnership
	January	Literature Review: In Principle, In Practice
EDL 552	**March 2008**	
	March	Case Study NLU, Kohl Children's Museum Teacher Preparation Partnership
EDL 602-603	**Winter 2008**	
	January	Leadership Journey Paper
	February	Academic System Analysis and Critique
	February	Communication and System Analysis Critique
	February	Leadership Takeaways
	Winter	Strategic Planning in a Culture of Change
EDL 622-624	**Spring 2008**	
	June	Museum Educators and Curriculum Analysis
	May	MIP Ed Directors Proposal: PD Series: Leading in Learning Organizations

	Spring	Roberts and Quinn paper – Standards-Based School Reform and Museum Education
	May	Leading Change in Learning Organizations
	May	Professional Development and School Change
CORE	**Summer 2008**	
	June	A Musical Metaphor For My Own Professional Aspirations
	June	AS-IS
	July	TO-BE
	July	Reflective Journal
EDL 620	**Fall 2008**	
	October	Museums and a Democratic Society
EDL 603	October	Who Are You Reflective Assignment
	December	Museums and Equity: Leading in the DuSable Museum
EDL 601	**Winter 2009**	
	Winter	Finance Survey
ESR 610	**Spring 2009**	
	May	Journal One: Pragmatism, Pierce
	May	Journal Two: Marxism
	May	Journal Three: Existentialism
	June	Journal Four: Senese and Action Research Laboratories
	June	Class Presentation Illinois Holocaust Museum
ESR 612	**Summer 2009**	
	July	Research Project Proposal
	September	Museum Educator Survey: Learning Communities
ESR 614	**Summer 2009**	
	July	Article Critique,Tran: "The Pedagogy and Goals of Science Museum Educators"
	July	Qualitative Problem Statement
	July	Interview transcript
	August	Interview, Observation Document Assignment

My experiences in both the graduate and doctoral level programs helped me unearth theories about leadership, which led to the complexity of this study, and eventually to the methodology I chose for this dissertation. Strauss (1987) wrote, "mine your experience, there is potential gold there!" (p. 11). Reason (1988) extended this idea when he wrote, "We should not "suppress our primary experience; nor do we allow

ourselves to be swept away and overwhelmed by it; rather we raise it to consciousness and use it as part of the inquiry process" (p.12).

The Wagner Framework: A Tool for Understanding the Present and Envisioning the Future

In the summer of 2008 I was introduced to Tony Wagner's "As-Is/To-Be" framework in his book, *Change Leadership: A Practical Guide to Transforming Our Schools* (Wagner, 2006). In this work, Wagner introduces a tool built upon principles of change leadership and systems thinking that enable school leaders to enact systemic change. "A system is a "perceived whole whose elements 'hang together' because they continually affect each other over time and operate toward a common purpose." Systems thinking is about trying to keep that "whole" in mind, even while working on the various parts" (Wagner, 2006, p. 97). Wagner's "As-Is/To-Be" tool identifies four arenas for change where systems are evident: Culture, Context, Conditions, and Competencies (4C's). Wagner charges school leaders to dig deeply and describe each of the 4C's in the "As-Is," or the way things really are in a school building, in order to lead change toward improved instruction (Appendix B). Further, Wagner guides the reader to envision the "To-Be," or an envisioned future where the arenas for change (4C's) enable high quality instruction to occur. This "As-Is/To-Be" tool became a thought framework for me as I continued hone my inquiry (Appendix C). Throughout the remainder of my doctoral coursework I used the Wagner framework as the basis for continued inquiry, modifying and clarifying the examples provided for each of the arenas for change (4C's) to reflect the museum setting as I gathered new information. What began as an exercise in understanding became for me a framework on which to build a more formalized study. I

have included data related to my work with Wagner's framework in my final analysis, and consider this period of study a starting point toward envisioning what the profession needs in its leadership. In the next phase of my research, my foundations for grounded theory were built.

Research Design

When considering the design of this study I was purposeful in crafting opportunities to collect the depth and scope of data to allow for rich and nuanced theory building. Charmaz (2006) advises, "An ethnographer who engages in detailed sustained observation and concludes the study with ten intensive interviews of key informants has far more to draw on than someone who has simply conducted ten rich interviews" (p. 18). I followed her advice and designed the study to obtain a depth of data that would provide me with rich sources from which to draw emerging theories.

Using the culturally rich surroundings of a city in the Midwest, I sought out a group of six museum education department leaders to participate in my study. I began by selecting two leaders who I knew from my prior experience as a museum education department leader. Members of my dissertation committee and other museum colleagues provided assistance in helping me to identify other museum education department leaders to invite to participate. In all, ten individuals were nominated as possible participants. I selected six individuals from this pool of nominations (my rationale for participant selection can be found in the section entitled, "Participants"). All six individuals immediately agreed to participate in two semi-structured, intensive interviews and one observation at their museum site; provide documents for analysis; compose written reflections about a reading I provided; and participate in two half-day workshops. At the

conclusion of the second workshop, participants were asked to produce a final product for me to add to the document analysis. More information about the participant backgrounds and institutions can be found in the section of this chapter entitled, "Participants."

Interviews with the participants and on-site and observations comprised the activities during the first four months of data collection, followed by participant reading and written reflection, and culminating with two face-to-face workshops in January 2011. The two half-day workshops were the only times during which all the participants came together discuss leadership, examine frameworks, and learn from each other. The focus of the workshops centered around two main concepts, both of which are interrelated: Systems thinking and change leadership. Prior to the first workshop, participants were given an article to read and related questions to respond to. During the first workshop we discussed the article, participants were given an introduction to the Wagner "As-Is" framework, we revised the changes I had made to the Wagner descriptors and identifying questions to better reflect the museum context, and spent time brainstorming problem statements. Upon completion of the first workshop subjects were asked to complete their "As-Is" prior to the second workshop which took place two weeks later. In between workshops one and two I provided the opportunity for participants to join me on a conference call to discuss their process and receive guidance as necessary. The second half-day workshop included a review of each subject's "As-Is." The focus of this workshop was to examine the concepts of systems thinking and leading organizational change so as to equip the participants to engage in moving from their "As-Is" to the "To-Be" in future work. Each participant shared his or her "As-Is" and we discussed their findings as a group.

Throughout the data collection phase I was careful to document the lived experience and process of leadership for each individual -- the phenomenology of their practice. Rather than attempting to describe each setting, I chose to examine leadership processes *across* each setting. "Grounded theory ethnography gives priority to the studied phenomenon or process rather than the setting itself" (Charmaz, 2006, p. 22). Also, I was purposeful in moving from passive researcher to full participant as I deepened my relationships with each participant. I could not ignore the fact that I shared some of the same experiences having been a museum education department leader myself. To remain removed from the participants felt disingenuous. "Our respect for our research participants pervades how we collect data and shapes the content of our data. We demonstrate our respect by making concerted efforts to learn about their views and actions and to try to understand their lives from their perspectives" (Charmaz, 2006, p.19).

Data Collection Methods

Using the Wagner 4C framework as a starting point, I set about gathering data in interviews by probing deeply into an analysis of the context for the museum educators' work, exploring how they described the culture of their institutions, noting the conditions under which they led, and assessing their competency for leading museum educators. During this time I followed Charmaz' (2006) guidance, "An interview is a directed conversation; an intensive interview permits an in-depth exploration of a particular topic or experience and, thus, is a useful method for interpretive inquiry" (p. 25).

Throughout the first round of interviews I sought to ask questions that would enable "the participant to describe and reflect upon his or her experiences in ways that

seldom occur[red] in everyday life" (2006, p. 25). To that end, my interviews included a combination of semi-structured and open-ended questions to gather information related to the context of their work, the culture of their institution, the conditions of their work, and their competencies as leaders. During the second round of interviews I centered the questions around the participant's efforts at creating professional learning communities and developing teacher leaders among their respective staff. During both rounds of interviews, however, the conversations took individualized paths as the participants brought new insights, challenges, or issues to the conversation.

On-site observations at the participants' institutions were open ended in that I did not enter the observations with any preconceived data collection tool or framework. I invited each participant to select the activity they wanted me to see, but provided a few guidelines for the observation so as to avoid any tendency toward positivism: Each individual was asked to select a scene in which they were leading an effort with a group of stakeholders. They could choose a board presentation, a professional development session with their staff, a working session about curriculum or programs, a lesson they were teaching, etc. They were specifically asked *not* to select a scene where they themselves were passive, such as a staff meeting where the agenda for the day was limited to announcements. "In this sense, grounded theory dispels the positivist notion of passive observers who merely absorb their surrounding scenes. Grounded theorists select the scenes they observe and direct their gaze within them" (2006, p. 23).

During the latter part of data collection participants were asked to read a chapter from a selected text and respond to a set of reflective questions about leading

organizational change (Appendix D). They were required to submit their reflective writing prior to the first in a series of two half-day workshops (Appendices E-I).

In the first workshop (held on January 13, 2011), I situated our work within the larger context of demographic and cultural shifts in the United States and the impact of these shifts on museums, and included discussion about major issues related to public education. We discussed the topic of change theory, I introduced the Wagner "As-Is" portion of the framework and together we modified the descriptors of each of the 4C's to better reflect the museum environment (Appendix K). Each individual received his/her interview transcripts to aid them in identifying problem statements. The participants were charged with completing the "As-Is" part of the Wagner framework prior to the second workshop which took place two weeks later.

In the second workshop (held on January 26, 2011), each participant shared his or her "As-Is" assignment (Appendix L), and we discussed their findings as a group. The participants chose to continue working on their "As-Is" assignment after the second workshop and agreed to submit them to me individually a week later. I provided an orientation to the "To-Be" part of the Wagner framework, I led the group in an activity related to understanding systems thinking (Appendix M), and we discussed a strategy to invite other museum education leaders to form a professional development network. After this workshop participants were charged with completing their "As-Is" assignment by February 9, 2011.

Participants

The participants in this study are education department leaders from museums in a large city in the Midwest. I deliberately sought out a diverse group of leaders; diversity in

terms of museum type, size and focus, department size, years in the museum field and in leadership positions, and diversity in terms of race, gender, ethnicity, and age. It was also important that I work with leaders who were at the head of their departments, as opposed to mid-level leaders or coordinators. Table 3 presents a profile of the six participants. Their names have been changed to protect the identity of each participant, and the names of the museums where they work have been removed.

Table 3

Research Participants

Subject ID	Position	Years in Current Position	Years in Museum Field	Institution's Average Annual Visitation	Museum Type
Monique	Associate Director of Education	2 years	3 years	1 million	Aquarium
Miguel	Vice-President of Education	5 years	20 years	250,000	Science Center
Rebecca	Vice-President of Education	3 years	6 years	250,000	Zoo
Laura	Education Coordinator	3 years	8 years	25,000	History Museum
Noelle	Vice-President of Education	2 years	8 years	380,000	Children's Museum
Ana	Director of Education	5 years	11 years	200,000	Ethnic Arts Museum

Data Analysis Methods

Knowing that I wanted to examine leadership in the field, I chose to use case study as a way to frame my initial data analysis. Each case, bounded by the context of the participant's experience and setting, formed a starting point for analysis of data collected

through the variety of qualitative data collection activities (interviews, observations, document review, and workshops). The conceptual framework I chose – Wagner's "As-Is/To-Be" -- provided a starting point for engaging in the research, the methodology for analyzing data – grounded theory – provided a systematic way to go about coding data and identifying themes, and my method of presenting my findings – case study – enabled me to bound each of the participants into his or her specific context in a particular time and place. Once I situated each case through several rounds of coding, themes emerged that crossed cases and enabled me to examine processes of leadership, moving out of case study into a more nuanced, strictly grounded theory analysis.

I conducted data analysis simultaneously with data collection, constantly comparing data sets within each case to identify categories, properties, and formulate theories which emerged from this analysis. I began with line-by-line coding of interview transcripts and written reflection pieces, then moved on to memo writing, axial coding and sorting to unearth emerging theories. I examined primary source materials and other written documents including the final product provided by the participants: their completed "As-Is" assignment (Appendix F).

Once each case had been mined thoroughly and themes identified, I cross-tabbed the individual case studies to look for patterns and new themes, triangulating data about emerging theories. However, while the Wagner 4C's framework was used as a foundational frame for my study, the 4C's did not drive the theory building. Also important to note is that upon identification of themes that crossed cases, my analysis shifted away from case so as to continue my investigation of leadership processes.

Ethical Considerations

Given the nature of my inquiry it was important for me to ensure that the data provided did not cause tension between participants or between institutions. Further, it was also important for me to be transparent with the leadership (Presidents, CEO's) of each institution so that my research was not perceived as a threat to the institutions. I asked each participant in the study to inform their museum President about this work, and I also asked them to involve others in their institution as they completed their "As-Is" assignment. I aimed to foster collegiality in the workshop settings, and among the participants. At the conclusion of this research, I began working with four of the six participants on a federal grant to fund the creation of a leadership network to continue the work we began during this study.

CHAPTER FOUR

MEET THE PARTICIPANTS:

THEMES AND EXAMPLES OF PRACTICE

Introduction

How do the leaders in this study lead? Why does one leader appear to be more successful in fostering good teaching and learning by her staff than another? Why are some education departments perceived as ancillary within their own institutions, while others appear to have more power and influence? If what drives their leadership is not ultimately about visitor learning, then what else compels the participants to want to lead in these settings? These are some of the questions I grappled with as I mined the data. In this chapter I will introduce the participants, share their professional backgrounds, provide some background on their institution, and introduce examples of leadership practice unearthed in my research.

Ana, Director of Education at an Ethnic Arts Museum

Ana is the Director of Education at a medium-sized ethnic arts museum located in a predominantly Latino neighborhood. A young and vibrant leader, Ana began working at this museum eighteen years ago when she was a teenager, starting as an intern and working her way through the exhibits department and into the education department where she was appointed Director of Education in 2005. Ana attended college while working at the museum, obtaining an undergraduate degree in elementary education in 2001. Her intention was to leave the museum after graduation and teach in a nearby elementary school. When asked what compelled her to stay at the museum, she responded:

> I was able to see a lot of correlations between being a teacher in the classroom and what I was doing here. I did feel that I was teaching, I saw it back then and I still do see it as alternative teaching. We're still teaching, it might not be in the classroom day in and day out, but I was giving workshops to teachers and helping out in creating curriculum for students. So I think I was still around the environment that I wanted to be impacting education, and I was doing it here. And, if anything, it was more project-based here so I think it was a little bit more. . . there was a lot of fulfillment [because] I got to learn about different topics and programming with that. So after a few years I realized wow, it encompasses everything. And on top of that the content happens to be part of my heritage, so [I had] even more enthusiasm for remaining here.

Ana worked as the teacher and school programs coordinator for three years before being appointed Director of Education in 2005. "Everyone, even including myself, was very surprised when the education director left and I came into the picture. The first couple years there was a lot of learning. It was a lot of work and I was not able to see everything big picture." Ana made the decision to obtain a graduate degree in education. She enrolled at a local University in the instructional leadership program in education studies. "Before I envisioned myself in the museum I thought I would love being a principal of a school . . . or be some kind of coordinator for school area. That's always been in the back of my mind, but I end up working with the same people [here] anyway, [but] in a slightly different capacity."

Ana oversees five full-time staff, eleven part-time, and ten contracted artists. Her department is the largest in the museum. Her suite of programs is typical for an ethnic arts museum: Tours and workshops for students, teacher professional development workshops, outreach classes in schools, after school programs at the museum, special events like their annual Day of the Dead program, family floor programs and a very popular artist-in-residence program.

The museum itself was founded in 1982 as a non-profit by a group of teachers "who back then knew that 25% of the population in the [city] public school system was Latino and predominately Mexican background. They wanted this place to be a source of [culturally affirming] resources for teachers. They also wanted to promote Mexican culture with everyone else. So it was founded with that mission." The non-profit opened its museum in 1987. Given the historical precedent set by the museum founders, the education department has always been perceived as critical to supporting the mission of the museum. "I would say that the other departments see us very positively. They understand that we are a driving force for this institution. The budget . . . we are about a quarter of the entire museum budget, if not more."

This museum is rooted deeply in its surrounding community. Ana serves on a local education task force which focuses on improving the neighborhood schools, and provides additional supports to aid school aged children and their parents. As a result, Ana has fostered close relationships with the school principals and local business leaders who also serve on this neighborhood education taskforce.

Ana is deeply rooted in her Latino community as well. She was born in that community, went to school there, and is raising her own family there. The times when she can connect her museum to the local community is when she feels her work is most meaningful. "The way [the museum] is tied into the community that we serve . . . we understand. A couple weeks ago I was at a fund-raising gala for another community-based organization and they were playing the video of their work over the last 20 years. I have such bizarre, strange moments when I see myself in those videos. That's my story being told. But then, on the other hand, I'm also the professional oftentimes telling other

people's story, which is just like my story." Ana wants to give back to her community, and believes that her work at the museum positions her best to do this. "Our mission impacts everything and it infiltrates everything. Our passion and commitment to the mission binds it all – even in the toughest, darkest days."

When discussing her work, Ana chose first to talk about her parents. "My work ethic comes from my parents who taught me to be responsible and be accountable and ethical and honest. All those things came from my upbringing and [from] my experience here as a bicultural child of immigrants."

For Ana, teaching is "at the center of my passion." Ana is especially interested in working in an environment where she can teach about cultural understanding, or help Latino children to feel proud of their heritage:

> There's tons of literature about cultural responsiveness, but the 'how- to' hasn't been addressed. And I feel like because we have been doing that a lot, we haven't focused on that and tested that. We work with teachers, and teach them about cultures that they can teach kids. Our evaluation has shown [that] we have kids of Mexican heritage who have really negative views of their own culture and background. They are ashamed of what their parents did in Mexico, or what they think their parents' culture means. I was really sad. And so I had been looking at that, and I got really close to thinking: this is a framework, but we never tested it. We kind of went in a slightly different direction, and I don't feel comfortable sharing something when we haven't really tested it in that way.

Ana did not shy away from evaluation or research, although she confesses that she would like to feel more confident about it. She understands the power of educational research: "I think for me I still don't feel like I have a strong handle because I have more to read on it. I don't consider myself being yet in the research mode because I have yet a lot to learn. A lot of stuff I think I just assumed."

Ana is also a lifelong learner. “I told my husband that I'm done with my coursework and I wish I could take one course here and there because it's great to still be keeping that going and learning about recent theories.” When referring to her graduate coursework she elaborated on how much knowledge and skill teachers must have to be successful. “I was sitting in those courses and I [thought] how can a teacher be out there without a Masters degree, honestly? . . . As an educator you cannot stop learning.” When asked how many of her staff have Masters degrees, she responded, “It’s myself, and one person who is almost done and I want to say that our youth programs coordinator as well.” When asked if her institution supports staff going back to school to get additional degrees, she laughed and said, “I haven't seen it identified as a priority. It should be. Because sometimes it's like speaking two different languages and not understanding the goals. It makes it really challenging sometimes. And sometimes even it's not PD, it's training, after training, after training.” When discussing how she works with her staff she said, “We’re still learning.”

Ana is passionate, but even-keeled. She holds herself and the staff accountable, a strength she honed while in graduate school. Ana has grown in confidence and skill as a result of ./her participation in her graduate program in instructional leadership. “Ever since I started school I definitely saw a shift in the way that I did things. I think either when we're about to start a new program or I was going to present something to them, I now feel like I have to reinforce it with a theory or a principle or something behind that. I need them to read something in order to prepare for this, even if it is in the initial planning stages. I want to say that I make myself more accountable and I make them accountable at the same time. I started giving them more tools.”

Monique, Associate Director of Education at an Aquarium

Monique is the Associate Director of Education at an aquarium. Monique joined the aquarium two years ago after participating as an Education Fellow in Arts and Culture Management through a local philanthropic organization. Prior to Monique's museum work, she obtained an undergraduate degree in marketing and made plans for a career in business. She worked for seven years at a large automobile company, obtaining an MBA in marketing and sales while working there. When asked how she found herself moving toward the field of education she responded:

> While I was doing my MBA, I always found myself drawn to the people aspect of it. The market research. Why are people buying what they buy? Why [are they] doing what they're doing? How can we shift their behavior to buy this? That sort of approach. But then I felt, as I became more mature in the business sense and as a student, I felt like ultimately I really don't care if you buy a tire or a package of chips. So the consumer products manufacturing just didn't seem interesting. So on this journey to find where can [see myself], I take this passion that I have for growing business, organizational management strategy and apply it to an industry that I care for, that's how I discovered education. And at the time I started to learn about different people that were taking their business skills and going to education just like that. While that can be very helpful, I personally valued the teaching and learning process and I wanted to know that and connect to that. My particular interest was early learning, so it seemed like a nice package when I found the M.Ed program. I was like fabulous, my business skills and my educator skills coming together to create learning environments.

Monique enrolled at a local University in the Early Childhood Administration program (M.Ed.) and graduated in 2006. It was during her graduate program that Monique discovered the museum world as a volunteer at an area children's museum. When she completed her graduate program, she was asked to interview for an Education Fellowship in Arts and Culture:

> It's interesting because when I think of my past work experience I think about it in two major stages. The first is what I like to call my first career. For seven years I worked with [the automobile company] as a marketing and sales manager. During that time I went back to [the university] and got my degree in early childhood care. And after that, the next major piece was my time [in the fellowship], which I believe was instrumental in connecting me where I was then to where I am now. It was a fascinating experience. It was that plunge into the nonprofit space for me. It was that plunge into education environments and organizations that are tasked with educating people and helping people broaden their understanding. So it was awesome. It was freedom from my first career, and the gateway to everything that's to come.

Monique was one of six fellows chosen for the Fellowship program. She spent time working in four month rotations at an aquarium, a science museum, a history museum and a children's museum before being asked to interview for the Associate Director of Education position at the aquarium she now works at. Monique and the Director of Education, oversee a large department consisting of more than twenty full- and part- time employees, and a large cohort of volunteers. Programs range from onsite student labs and workshops, to teacher professional development, to outreach in communities and schools, family programs, and programs for teens. The aquarium is visited by more than one million people annually.

Monique applies many of her business skills directly to her work in education. She's a self-starter, she's entrepreneurial, and she wants to affect change. "My original goal was to start my own business and become a child care provider/owner/operator. As I got more into the field and understood the challenges that face the field, I felt more compelled to help bring about change before I really started operating as an entrepreneur. But then this museum opportunity came up and even though I volunteered at the children's museum I had actually never considered working in a museum."

Monique is a strategic thinker, especially in terms of her own professional path. She is not afraid to address the gaps in her experience:

> During my time at [the automobile company], and my work with [the university], I felt like I needed to get some experience in the real world to complement what I was learning at [the university] because my day job was so different. So I spent a lot of time volunteering at the children's museum. It's still is strange to me. Given how much I thought about my career, all the options that it could take, how easy the children's museum came to mind in terms of volunteering to complement my learning. All of those things, it's still weird to me that I never…Maybe I should say I didn't think about working at any other museum than the children's museum.

Monique uses a lot of business terminology in discussing how she works. She refers to museum educators as having "direct interface with learners," and, "Our educators very much are busy designing and executing programs." When discussing the need for more program evaluation, she described her goal to "strengthen our data collection and communication, our whole data infrastructure." She uses business terminology and practice when discussing her first days at the aquarium, "really maximizing my first 90, my first 180 days." And when asked the kind of work she did during the Fellowship, she said "I did a lot of department-wide training on personal mission statements."

Monique is especially interested in understanding how people make decisions. During her time in the M.Ed program, she said:

> The human development component of that program really stretched my thinking. It really opened me up and that's one reason I was drawn to early learning. The amount of growth that humans go through in the first 10 years is amazing. And it's interesting because so much time is put on learning like 7 to 10 years and beyond, but so much development happens before then. So, the human development parts of those programs, the learning of Reggio Emilia and Montessori style of teaching, they all melted together to kind of make sense.

During Monique's M.Ed. program, she honed her educational philosophy, "Which is inquiry-based, connecting where your learners are at. Understanding that [you need to ask] the right questions to find out where they are, and not [come in] with an agenda that you're dumping into a framework. [You need to] allow the information you're collecting from your learners to plug in. So it's really a more design approach in the learning experience as opposed to, "Okay, I have 50 bullet points that I need to communicate."

The Fellowship program gave her an entre into museum work at an administrative level which she believes prepared her well to step into the role of Assistant Director:

> Working at the four museums I had a good understanding of the role that an assistant director would play primarily because I was working so closely with the directors in all of my rotations. Most of the museums that I went to were comparable in size: it was [an aquarium], then [a science museum], then two smaller ones: a history and a children's museum. So I was able to contrast and really understand the scope and range of responsibilities for assistant director. I also had the opportunity to really see how my skills from [the automobile company] translated. The Fellowship was a testing ground and it really validated that I had something to bring even though I hadn't practiced in the classroom. I didn't have any specific training on the content of the museums. From an administrative position in terms of leadership, organizational development, staff training, those things that really are the responsibility of the director and the assistant director. I had other experiences that helped prepare me for that as well as my understanding of pedagogy and theory and human development. My work with [the university] really helped me understand the educator side.

Noelle, Vice President of Education and Community Connections at a Children's Museum

Noelle is the Vice President of Education and Community Connections at a children's museum. Like Monique, Noelle changed her career path when she chose to start working in a museum:

> Going into the museum field was a career shift for me. My undergrad[uate] degree is in journalism. I ran away after college to Los Angeles and worked in the film industry for a while in a production company, really working with writers actually, reading and developing scripts which was tied into the sort of media background that I had. But while I was out there I volunteered at [a local art gallery] in their family gallery and art making space. It was one of those situations where your volunteer work becomes what you really wish you were doing. So I decided to go back to graduate school and got a degree in education. I looked at working in classrooms and yet what I was really called to was more informal learning environments. So I ended up going to [graduate school] and really focused on arts education, and became even more interested in museum education while I was there.

When asked what experiences she had at [graduate school] that prompted her to consider museum work, she said:

> I really think it was broadening the scope of what the opportunities were for working in education. So that was really a phenomenal experience. I also worked at charter school that was just fledgling at the time. It was just in its second year in Dorchester. They really were all about experiential learning so we went every Friday and took the students to the Museum of Fine Arts Boston and spent the entire day there doing work. So it really solidified this love [for me], seeing firsthand the power and impact of working with children -- at that point high school students -- in these sorts of environments.

After graduation Noelle volunteered at a children's museum as floor staff before taking a job at a small community arts center. "That is, I think, where my leadership skills in an organization really started to grow. This was a two-person operation, and so

we were establishing the curriculum, and leading all the courses and writing grants, teaching classes, dealing with our budget. So really [it] became like running a small business. And yet it was a nonprofit arts education institution." After working at the arts center, Noelle joined the staff at the children's museum in 2005:

> I found an opening back here in the museum in our art studio and arts department. So [I] worked with that team for about a year and then moved into student and educator programs where I directed the department, really working on bulking up our professional development offerings, building on our student programs, and sort of trying to build a team there. That was when I really started understanding our demand for professional development, particularly for teachers of early learners. So we kind of started building and growing in that department. And I worked with a team for about two years before [the president of the museum] restructured the department and I came to the position right now where I oversee the broad scope of our education department.

Noelle has two Associate Vice Presidents (AVP) that make up her senior education team. One of the AVPs oversees the Education side of the department while the other oversees the Community Connections side of the department. There are 20 full time education staff at the children's museum, as well as 20 part time (front line) and 40 contracted staff whose main responsibility is to do outreach programming in schools.

The children's museum itself is located in the heart of the city in an area highly populated by tourists. The President of the museum rose from the ranks of education to assume the post in 2009. Education is the largest department in the institution, and the museum is visited by over 380,000 people per year.

Noelle is highly collaborative and easily able to multi-task, as is most of the staff at this children's museum. "We all wear a stack of 25 hats. There is no cog in the wheel position here as I think there can be at some much larger organizations. People really contribute everything across the board." She is also highly organized; an "obsessive list

maker," she likes to think of herself as being accessible, a good listener, and a democratic leader:

> I would say most hours of my day are scheduled to be talking to someone else, whether it's a whole meeting or with one other person. . . I have six direct reports and at least four of these people are then overseeing rather large teams of other people. So there is a ton of checking in, [and] a ton of just knowing that my head is wrapped around everything that's happening. We have a lot of brainstorming meetings where we invite front-line staff just to give us their input on something we're going to do. That's not just my department. That is an institution-wide cultural thing. I think that we gather input and gather [more] input. Sometimes it's very useful and sometimes I think while people want to be heard, it's also like they want decision makers to make decisions. So I try to be really sensitive to that. When it seems that everyone wants decisions, I'm not afraid to make them.

Noelle knows how to handle stress, a quality to be admired and perhaps emulated by others in her field:

> I think bad stressful is feeling overwhelmed, or you're stressed because there are negative things happening and you feel like you can't possibly catch up and there are too many issues to deal with, or [there are issues that] you don't know how to handle. Good stress for me is sort of what my experience here has been and it's really just that we are always trying to do so much. Wearing the 25 hats and wanting to wear them, too. I want to be able to help in all of these areas and I want to be able to support all 80 of the people who in the end are on my team. Yet it's just not always possible to be everywhere at every moment. Sometimes there are moments when I think, 'What do I do first?' I have 80 e-mails coming, the phone's ringing and someone else is here to talk to me.' Just knowing how to prioritize.

When asked where she struggles as a leader, Noelle admits the she doesn't feel she knows enough about research to be able to measure impact:

> I can't say that our staff nor myself have a great understanding of what formal qualitative research approaches are, and I think that is something we are looking to do in this plan, and, as I mentioned the proposal we wrote, that whole proposal is for building staff capacity around evaluation. So a lot more training on the fronts that you are talking about qualitative

> and quantitative analysis, how we collect data, how we analyze it, how we even choose what we are evaluating in the first place. Absolutely. That is something that we need.

Noelle is quick to offer up that she feels isolated in her position:

> I think that my role here is, while I do network and I know people at other institutions, I am very hunkered down on the internal workings of this place and it has a lot to do with the juggling and the 80 people. There's just so much within these walls. I feel like we're the Department of the Interior. And often my direct reports have more external contacts. Ana and student and educator programs is out in schools all the time and connecting with people at [the large urban school district in the area] all the time. One of the things I want to figure out is how to balance being an external presence as well as a strong internal presence. I felt like I owed it to my team to really focus my efforts on them and in-house. And have gotten a handle on that. I'm at the point where I really want to start building more of my external network.

Laura, Education Coordinator at a Settlement House Museum

Laura is the first full-time Education Coordinator to be hired by the settlement house museum where she works. Established in 1889, it one of the first settlement houses to be founded in the United States. The museum consists of the original home, the Residents' Dining Hall, and the newly opened Organic and Heirloom Farm. In its time, this settlement house was instrumental in promoting American democracy; its founder and the residents raised public awareness and ultimately affected public policy on such issues as public health, education, free speech, fair labor practices, immigrants' rights, recreation and public space, arts, and philanthropy. This settlement house established the city's first public playground and public art gallery, and played an active role in the desegregation of the local public school district. It has since been incorporated by a public University and is situated as part of the University's college of Art and Architecture. In 2005 the University made the decision to reposition the settlement house

museum as a community-based institution and hired a public historian with no prior museum experience as Director. Previous museum directors were experts in scholarly research, but the decision to hire this public historian with a background in public advocacy was the first indication that the University wanted to redefine the museum as a center for community organizing.

Laura grew up in Virginia and attended the College of William and Mary where she earned an undergraduate degree in art history. Upon graduation she completed several internships in Washington, D.C. museums including the Smithsonian, the Hirshhorn Gallery, the Phillips Collection and the Corcoran Gallery. It was during her time as an intern at [an art gallery] that she was "Struck by a number of the programs they do, especially those programs where they're working with inner-city youth. They were thinking beyond the role of the museum that I had ever imagined." Laura was so moved by these programs that she decided, "This is it. This is what I want to do. I've always been aware of the disparities between who [museums] say they reach and who they are really targeting, and I was really moved to work with underserved populations." She relocated to the Midwest in 2005 and attended graduate school. "What I really appreciated about their program over all the other ones I was considering was that this one had a really strong foundation in social justice, and that's what I was really enthusiastic about thinking about in the context of museums." She attended graduate school and in 2007 she obtained a M.Ed. in Arts Education. Her thesis work, while not at a museum, was centered on underserved youth, working with students in [an urban neighborhood]. "I wasn't working at the museum for that thesis project, because I felt it was more important to work with the population than beg a museum to let me do a six-

month project." Laura's degree is an art education, but her work is not about being in a classroom. She did not envision herself there.

Upon graduation Laura set about looking for work in a museum. However, getting a job in a museum proved much harder than she thought it would be:

> I graduated with experience and [tried] to translate that to the museum world. It was really hard. First of all, I think I was naïve about what it means to have a Masters degree and go into the museum field. It's obviously competitive. But I think, also, through all those kinds of experience in the kind of race and class theory that I had received, I was frustrated when I was looking at museum education jobs which were like tour booking and maybe doing some gallery learning. I wanted to do education but I felt like a lot of education jobs, especially in the larger institutions, I wouldn't have a creative. . . I don't know. I felt like the job was fully outlined and I was just going through the motions instead of developing new programs. It was like a year-long job search for me and I was really like, 'is that what I want?' 'Is that what I went to school for?'

In 2008 Laura began working at a settlement house museum as its first full-time Education Coordinator. Here she has connected herself to an array of social justice activists, researchers, and community organizers. She is expanding the work and presence of the museum to the economically and ethnically diverse communities surrounding the university. Here Laura is able to bring her passion for community based work, activism, and organizing with her, as it is directly tied to the museum's legacy. Re-envisioning of the museum by its director connects directly to Laura's passion for social justice and community empowerment.

Laura selects and oversees a team of six docents each year. These docents are all paid, part-time staff drawn from the university's student population. The new community-based direction of the museum prompted Laura to recruit and select students from previously untapped academic areas of the university:

> Suddenly it wasn't necessarily about being a history student or about having the most complex understanding of late 19th century labor history. Suddenly it was more about being enthusiastic and connecting with your audience. Suddenly feminist Marxist theory became relevant as opposed to more traditional academics. So we were drawing a lot more gender women's studies and urban planning [majors]. Right now I've got a graduate student who is from the school of social work, and who has vast experience as a community organizer; she's amazing. And she's the perfect educator for our new model because she can make real connections and she knows how to work with every different kind of population. It's been transformative, and I think that the caliber of our museum educators for the work that we need them to do has just gone through the roof. I've been so pleased with the students. It's always been a discussion about whether or not to use students for this work, which we consider to be real serious professional work. It's always been kind of mentorship process, but I think that the work that the educators do now shows us that they are great to do this kind of work.

Laura's passion for social justice issues drives all of her program development. She has introduced new program models and topics that make direct connections to the social justice work of the museum:

> [In]the Dialogue Programs, first this intact group of students or adults whoever's coming for the tour takes the general tour, and then we move them into another room where we do this facilitated dialogue with one of our educators where we are drawing on all the information they've learned from the museum, but the goal is really to give them an opportunity to talk back so that were not just lecturing at them for an hour. [This allows] them to make these connections between the past and the present and start to see how this material is really deeply relevant to their own lives. So we used a few different methods in order to do that, and different pedagogical strategies. . . Right now there are two conversations; one of them is on immigration and the other one is a little a more complicated. It's on strategies for social change. At least when I run the dialogue, it is really about the role of the government in creating social change.

Laura also began a new, potentially controversial program called the "Sex +++ Film Series" which is, in itself, an activist-based program:

I started this program a few years ago with a friend of mine who wanted to start documentary series on sexuality that takes a really progressive stance and falls in line with the sex positive movement, which says that people shouldn't be stigmatized for the choices [they make], and we need have better understanding of issues of consent. This comes out feminism and queer theory and all that. And so, when we started the program, I didn't think we were going to do it at [this museum]. I mentioned this program idea to my director, just to ask her, 'Where do you think in the city we should do this?' My director said, 'Here.' One of her colleagues just called us one of [the city's] queerest sites. This is where it needs to happen. So anyway. . . a lot of the content of the program is really radical for us. This is a 19th-century historic house museum and we're showing feminist pornography, whatever that means. We've shown a lot of different sexual sub-cultures, a lot of things are graphic, etc., etc. It's a little shocking for us as a museum. But my argument has been that by opening up ourselves to this community which I think lacked public legitimacy, lacked any kind of cultural space in [the city] that they could call their own, for us as a national historic landmark and as a major cultural institution in [the city], to say, 'Yes, you can come here and talk about these things here. This is important, [and]we're going to fight for you. We're going to fund you.' It's been totally transformative to that group of people and to that movement. And I think it's also really affected the work that we do at the museum. In my work in showing up at these programs and helping to curate them, I've become more educated in all of these issues and I started thinking about how to talk about prostitution at a museum. . . So I made sure that, as we re-curated the exhibits, that we took a different kind of stance on these things. So, for example, the story of one of [the city's] most progressive sex educator who helped to found [the city's] first birth control clinic and started a birth-control clinic at [this museum.] She was never included in the exhibits and [this museum's] history. People saw this as a women's history site, as a laborer site, as an immigration site. Nobody saw sex cases falling alongside of those things. Now, [sex education reform] has a place in the museum.

Laura sees the Museum itself as community activist:

I think what I care about most is the museum and the public and how we define ourselves as community and community organizations. It's interesting because of [this museum's] legacy as a social settlement. We can say, 'Well, this is in our legacy. We could work with activists because this is in our legacy. We can take a progressive stance on immigration because this is in our legacy.' But I think we're also starting to push back a little bit on that idea that it's only because of our legacy. Because that means that, even if you're at Monticello, that it's really easy to say, 'We can't be progressive because it's not in our legacy.' My argument is that a

> former plantation is the ideal place for a modern day workshop on slavery. . . It's us as a staff making those choices more than relying on that legacy.

For all of Laura's passion, and all of her success in reframing the issues dealt with by her museum, she is hampered by her pacesetting boss. For example, she is entirely removed from being able to make any decisions about budget, as the following excerpt shows:

Laura: I am in the fortunate position where I don't have to think about a lot of those kinds of decisions. It's [the Director] and it's through the college. We have these accountants who are full-time in the college, so they really handle that. But our only revenue, well, all of our grants are things like matching grants. We have a lot of obligations there.

TN: And who decides those matching grants? What's your role when those get written and when the ideas come forth?

Laura: My Director really takes the lead on fundraising. I think she protects the staff from having to go in seek the grants and stuff. Also our college has a full-time grant writer and so thankfully she does a lot of that nitty-gritty writing. I assist with writing the grants and the planning what we'd like to get out of them and what we'd like to do with academic funding, and I always help with editing grants all of that. But I don't take the lead on the ask.

The direction of programs and initiatives at this museum changes in a nanosecond, which makes it difficult for Laura to plan strategically, to form deep partnerships, and to establish deeply rooted programs:

> I feel like we're always still of the pilot phase of everything. We move really quickly here at the museum. We are really nimble here because I think were small and because our director has a strong vision, many visions for the future. We tend to take on a lot of programs and change them as we're doing them. I don't feel like we're at a place where we're ready to engage with one community group for a long period of time, although the question is, who would be the ideal group? Is the farm about connecting elementary school kids with working in the ground? This is about building urban food deserts? I think we're still defining our mission out there.

When describing her director, Laura states “She also provides the vision for what this place is about. Partly that's why it is so off-the-cuff because it really is her vision as that changes in time. And I really think that’s she was hired for. That's what they [the university] said in the meeting that she was hired to pick up on whatever was exciting and new and just to with it.”

Given these conditions, Laura is unable to plan strategically. “I would say that in many ways we are limited by the way that our organization works as a whole, which really means by the way that our director works which again is like a rapidfire, intensified environment. So a lot of times not able to do long-range planning because we might change it. We really try to be responsive to our community members all kinds of things so some ways that's limiting.”

Laura’s museum is different from the others in this study in that the community-activist approach to operating the museum sets this place apart from the other museums that operate from a more traditional stance. Given these realities, Laura seems isolated from her professional peers:

> I haven’t had deep relationships with a lot of the other museum in the city. And that’s something that I’m working on building up myself through emerging museum professionals and just my daily interactions with other professionals. This is my personal opinion, but I feel like we at this museum have a little bit of a nontraditional background. Our director doesn’t have a museum background, for example. I’m one of the few on our staff with a little bit of museum experience and so I don’t know if that means we don’t always share a language with other museums or if it means we just haven’t spent the last 10 years working with all the other people professionally. Sometimes it feels a little bit isolating as someone who cares a lot about museum professionals and wants to have a lot of museum interaction.

Rebecca, Vice President of Education at a Zoo

Rebecca is Vice President of Education at a zoo. She has a background in marine biology, and originally saw herself as becoming a field biologist. Slightly disillusioned while working as a graduate assistant in Texas, Rebecca made the decision to leave her graduate program and return to her hometown. Rebecca is a go-getter:

> I had enough experience to know that this research route wasn't for me at the time, but this teacher thing did resonate with me. But I had no idea that there was a career outside of classroom teacher. So then I started looking around and talking to people. I literally picked up the phone and started calling zoos and aquariums and would talk to anyone who would talk to me. A pivotal and transformative conversation I had was with Dan Marsh at the Columbus Zoo and aquarium. He spent over an hour talking to me about what it meant to be a zoo and aquarium educator and why it was the best job in the world – what he got to do, and how important it was. He talked and listened. . . So then I just started putting my application out. And I literally applied to every cultural, but mostly scientific, organization in and around [this city]. As luck would have it, there was a major shakeup happening at the aquarium. There were a number of educators who made some really bad decisions for the department. Unfortunately, some people lost their jobs over it. I started as a part-time educator, and it was a three day a week job. I did outreach and classroom programs, started in September of 1998, so it would've been 12 years ago. And by March, I was working towards becoming the adult programs coordinator.

It was only a matter of months before Rebecca was offered a full time position at the aquarium, which also enabled her to finish her graduate degree through a partnership with [a local] University where she finished her Masters in biology. When she obtained a graduate degree, Rebecca was offered a new position in the education department -- Director of Sustainability. She remained in that role for several years before making the decision to leave the aquarium and lead the education department at the zoo.

The aquarium culture was complex. There were some staff that collaborated well, but the way Rebecca describes it, many staff had formed cliques and engaged in power

struggles with their peers. The institution operated under a strict hierarchy. Rebecca had to learn to navigate the political side of her role very carefully. The following excerpt illustrates the toxic culture:

Rebecca: It's this group which currently still exists. Every time I went to a meeting I cringed. I hated to go. I asked Cathy [her supervisor] to get me off the team. I know that I'm supposed to want to do it because I had access to [the President] and that's great. I had a great relationship with [the President]; he was so supportive. And I adore many things about him. But any leader has [his or her] weaknesses. There were a lot of things going on [in this group where] he should have stepped-in.

TN: Like what kind of things?

Rebecca: Just generally speaking folks nosing in other departments business. Going back to the whole 'We can do this better.' And, 'Why don't they do it this way, we can go this better, we're gonna give department heads some bullshit assignment so that either, A., they won't produce because we all know are all working like dogs, or B., they'll produce but it won't be what we want and so we'll counter with a different plan. Or just back -door the whole thing.' [They] just undermine people's authority and expertise. [There's] just an overwhelming lack of respect. It became clicky. And there are a number of very strong personalities on that group. It's not a group that you want to be on, but it's not a group you DON'T want to be on either. You don't want to be an outsider. You could feel the lazer beam on your back if you're not in that group.

Rebecca made the decision to leave not because she was unhappy at the aquarium, but because she would eventually like to lead a zoo or aquarium as its president. She felt she needed zoo experience in order to build her resume:

> I actually think about this a lot and one of the reasons I came to the zoo was because I felt like that would give me the zoological perspective, which is very different than aquarium perspective. There are really important differentiating qualities and modes of being between these two institutions. . . For example, the aquarium will break ground on a new project when they have – I think the threshold for funding is maybe 25% of the project or something. We don't [at the zoo] until we have 90% of the project. And I can see the pros and cons of both. So those big picture [factors].

Rebecca is unafraid of taking risks. For example, when she began as a full-time program coordinator at the aquarium she boldly approached the new Director of Education in the department to suggest a new structural component to the department:

> When Cathy and Bob brought Carl back to be the director, I was manager of public programs. I was also doing adult programs because we didn't have anyone else and I was sort of doing two jobs. I told Carl when he started, 'You need an assistant director, I'd like to be your assistant director. So let's figure that out.' Well, there were a handful of other people who also wanted to be his assistant director, but about a year later I was promoted to assistant director.

She brought her fearlessness with her to the zoo when she began as the Vice President of Education. Rebecca's arrival at the zoo coincided with a major round of layoffs of zoo staff. She was assured, however, that her education department would be spared:

> Tom and Neil said to me, 'We're not going to ask you to do anything with [your] department.' I went home and thought, 'Thank God.' Then I thought, 'Wait a minute. Maybe I want to. Maybe this is an opportunity to make some changes.' So there were a couple of things that happened on their own. The negative of the financial fallout was the financial fallout, but the positive was that it did allow me to make some changes that really needed to happen. So I came in with some ideas that I proposed to Neil and Tom they were, I think, really taken aback that I would be open to that and willing [to make cuts].

Rebecca proceeded to layoff some staff. "[We] gained with flexibility in seasonal positions, and taking some positions that were more expensive and resource-heavy and rethinking those, and repurposing those resources to create other positions and some other opportunities for some people. Looking at salaries, titles, and what we need. Do we need worker bees, facilitators, implementers, deliverers."

Rebecca also took the shakeup in her institution to level the long-standing docent program:

> We had staff to manage them but it was a really large unmanageable group of almost 200 people who had seen and outlasted a revolving door of leadership and new vision and new ideas in this department. For me, as a new leader, that was going to be a huge challenge. The docents wrote me off from day one. I had no credibility with the group. I hadn't even opened my mouth and I had no credibility with the group. It was not about me putting them in their place but it was [an] opportunity to hit the reset button and say there's a new sheriff in town. Even more importantly [was] that best practices were not being used and we didn't have the capacity to train them in a way that needed to happen. It was a mess. It was a big, fat, sloppy, wet mess. I didn't even know where to start to fix it, it was so broken. And every time we tried to tweak it was sort of like the little boy with finger in the dike. I put my finger here and it would start spraying there. I think a number of brave and valiant attempts had been made to try and set it straight. But [institutionally] there was a lot of, 'This is the way it's always been, it's too hard to change. You can't mess with the docents.' One of the things that we heard was, 'You're asking for a shit storm if you mess with the docents because they are a huge financial base for us.' I said, 'Prove it. Show me and let's do the research to find out how they're giving. I mean, we know that they're giving of their time but are they giving of their treasure? Are they putting their money where their mouths were?' We found out they weren't.

Rebecca inherited a department with little credibility. Much of her time is spent raising the profile of her department, leveraging that expertise, and taking credit for both revenue and attention earned by other departments that rely on the help of educators:

> So what I have tried to do is that in meetings, both with development and earned revenue, is to say, 'Look, we want to enable you to do whatever it is you want to do whether that's meeting your revenue goals or your membership levels or whatever. We are a service department, in some sense of the word. We have to be realistic. We can't do everything. So how can we leverage what we can do to get the biggest bang for our buck?' And I've also been really open to say, "But don't think that I'm not going to take a little bit of credit for whatever success you have, because that will help us do more of what we do and that in turn will help you. I get another body in education, then you're going to have another educator to support yet another one or five events or whatever you got.' So I know

> that they get frustrated because it sounds like we are constantly saying no, but what we the challenge for us is to figure out how to make them understand. It's those little teeny tiny successes where I am like, 'Okay, we need to be all up in their business about this really good thing that happened as a result of us working together.'

Rebecca's zeal for becoming a zoo or aquarium president is often stymied by her superiors:

> "I feel like I'm learning a lot. At the same time I was really hoping that -- and I know I'm still new -- but I was really hoping that I would have gotten more exposure and more opportunity here to really impact the course of this institution [the zoo]. And I will say it again, there is one person that is really I see as being an obstacle to that. I think Neil to some extent, too. . . I do see him as a little bit of an obstacle because I think that there are a number of things I could tackle and take on but that he is like holding me kind of putting up the no-no. And I think some of that is very well intended. I think it's all well intended. It's a little frustrating."

At the same time, Rebecca recognized that she has a lot to learn:

> If I were CEO or director of a zoo or aquarium I think [I would need] to have some experience making decisions about how [to] build a collection, how [to] maintain a collection, understanding things like how much holding space you need, what are some of the issues that you deal with everything from procuring stuff that the animals need to making long-term decisions about breeding how you're going to decide what you're going to breed and what you're not. And not that I feel like I have to be an expert, but I feel like I have to have some exposure so that I can have an intelligent conversation about those things. I feel like I can already because of my background in biology but again, it's in that managed sort of setting and it really boils down to my own comfort level and feeling competent as a leader. And then [there is] the legitimacy piece with the team. I know I have been led by people who are not educators. And I'm like well who the hell are you?

Rebecca oversees nine educators, and two directors. The department also employs a host of seasonal workers who serve as interpreters on the zoo grounds during the summer months. The most veteran staff member in the education department at this zoo

has been there for four years. This is an entirely new staff. The zoo charges no admission. The education department serves between 150,000 and 200,000 visitors annually.

Miguel, Vice President of Education at a Science Museum

Miguel is the Vice President of Education at a medium-sized science museum. Miguel graduated from Cornell University in 1989 with a degree in physics. Miguel started his career in museums over twenty-five years ago. “I originally started at a[a different science museum] back in 1990. [I was] just looking for a way to pay the rent, basically. So I was in visitor services for about six months. Someone from education caught me doing a coal mine tour and asked me to interview for a position in education.” Miguel worked delivering educational programs for three years before being asked to join the science museum. What’s most interesting here is that Miguel chose to leave [the science museum] to take an internship at a different science museum because he believed the president of [the science center her was working at] was moving the institution away from being an educational organization. “At that point in time the president wanted to shift away from education. He went so far as to change the name of the education department at that time to I forget what it was, but they changed the name so it would sound less educational.”

Miguel has been at his current science museum for over eighteen years, rising from intern in 1993 to Vice President of Education in 2007. “I've survived several presidents. We’re on our sixth since I've been here.” The science museum is actually one of the oldest science museums in the country, but the museum facility itself is newer, having opened its new public museum in 1998. The museum has had name changes,

massive turnover of staff and senior leadership, and significant financial challenges over the last twelve years. The museum serves roughly 200,000 visitors annually.

When asked what has kept Miguel at the science museum despite the many changes in leadership, he responded:

> The two things that have kept me here are: Number one, when I've been kind of done with what I'm doing there have been other opportunities here that interested me. Secondly, it really is people that this department attracted. I don't know what it is, but when we had [a staff reunion] a few weeks ago, the number of people who said this was the best group of people I've ever worked with was unbelievable to me -- over the years from the mid-90s to today. I don't know what it is. All I want to do is maintain that atmosphere in this position.

Miguel places high value on collaborative working environments with passionate staff:

> It's a general willingness to work together on things and to listen to one another. You know there have been some outliers where that hasn't been true, but in general people really want to work together and have a passion for the work they're doing. You know whether it be more focused on teachers or youth, we've always seemed to attract people who are very passionate about the work they do which, again, makes it interesting to be here.

As Miguel mentioned, he has seen lots of leaders – good and bad – come and go. This has given him the opportunity to observe different leadership practices and strategies. Miguel values leaders who are accessible and who listen to their staff. He also values leaders who know how to make a decision. For example, his first boss at the science museum modeled styles that Miguel has since incorporated into his own repertoire.

> She would take input from me, and I appreciated the fact that I predated her in the program, and she would take input from a few of the educators

she worked with for a while. But once the decision was made, the decision was made, and 'This [is] what we're going to do. So you need to accept that, and do this.' I still struggle with that because I know that when some people aren't happy with the decision that I made, it bothers me. I think I've gotten better about not showing it, but I still struggle with it internally.

Since assuming the role of Vice President in 2007 Miguel has worked with two Presidents and one interim President. The institution has faced significant financial and leadership challenges. One president was fired while the other stepped down as president inside of one month. The current president of the museum is a former board member who stepped in to stop the institutional bleeding. During this tumultuous period in the museum's history Miguel has been wounded several times in the short span of three years. The following are excerpts from interviews where Miguel describes instances where his president made decisions in a vacuum and the affect those decisions had on Miguel's ability to lead his department:

TN: What was that experience like working with Mary? It was probably your first experience working with the Board of Trustees and being at the leadership table.

Miguel: You know, [there] wasn't a lot of [opportunity to] work with the board because Mary kept those channels pretty closed. I found it very frustrating to work with her because she was very strong in her vision, in her ideas and thoughts, but she did not listen to input. From anyone.

TN: Can you give examples?

Miguel: Right after I started we had apparently gotten money from [a funder]t o do the a program study. [A consulting firm] was paid $30,000 do a pretty good study of what we needed to do in adult programs. Where we needed to go. Jane and I put forth some ideas on where we might go with adult programs based on this. Everything was out, except for the "Little Green People Podcast" because [the consultant] talked about new media. The President and her colleague, Madeline, had always wanted to do that. So they did it, and gave no real attention to anything else the study. But, of course, in a year, [the president began] asking why we hadn't done anything even though all the resources went to a different project. Again, not that that project wasn't something that wasn't justified by this report, but it was by no means the only thing they suggested we do. An enormous amount of resources went into it. Another issue was when we started doing the early

childhood series of workshops here with [an outside contractor]. We told her [the president] directly that if we work with [the contractor], this program is going to lose money. She wanted it to make money but [the contractor] was asking for a lot of money to do this program. But [the president] wanted to work with her because she was [a major stakeholder's] wife, and she was really good, but she was extremely expensive, and she wasn't any better than anyone on staff doing it. So anyway, it was, 'No, you have to do this.' And then year later, [she asked] 'Why are our programs losing money?'

In 2008 Miguel's department was split almost in half when the public programs team was moved out of his department and into the exhibits department. This decision was made by the president and with no consultation with Miguel:

Miguel: That happened arbitrarily in 2008. That's all I can say. It was arbitrarily done.

TN: By you, you mean?

Miguel: Not at all. And that was hard to not tell people. Because the last thing that I wanted to do was to set [the staff] off. When we had the mass layoffs in the fall of 2008, as part of that it was decided that public programs really needed to be with exhibits so that we could build a connection between those two departments so that team was shifted to Madeline. And then Madeline left about four months later and it still over there right now although there are still questions about how this may or may not operate or change or where it may go. Lindsay and those guys really got mad at me, and I can totally understand that. [They were] mad at the organization, [and they] really had a lot of baggage when Bob (the new Exhibits Director) came in. There was no other way to say it. I understand why that never worked.

TN: Did some of those folks leave?

Miguel: On their own, some, and then at one point Bob just finished it up and just moved on. It wasn't going to work. Through no fault of anybody's own who was part of it."

Recently Miguel made the decision that it was time the department was restructured in order to maximize staff and limited resources. Miguel involved his entire department in working sessions to determine the best possible structure. In the end, Miguel realized that he would need to make a very difficult decision, and it is one that still causes him no small amount of pain:

Miguel: Through departmental restructure here are three areas that we need leadership in, and when I started looking at it I realized that one of these leadership areas the strategic goals, visions, it's my job. That leaves two other areas. So we have an associate director program and evaluation and an associate director that's dealing with operations. What we're looking at now structurally is Janet and Betty are on as two associate directors. One is focused on program and evaluation aspects of all programs, which would be Janet, and Betty focused on the logistical pieces that make these things work together. Making sure everything holds together. Because those are where their strengths are. Pat was good in both, Janet was better in one and Betty is better than the other.

Tina: So is she here now, or is she gone?

Miguel: Pat is gone. Because the only thing I had left were coordinator positions. We've gone from 6 to 8 coordinators who have been given a little bit more responsibility to them because what we're trying to do is flatten some of what happens here and give everybody more voice. It just wouldn't fit. It was gut wrenching, especially knowing that the [staff reunion] was coming up two weeks later. But trying to look at where I wanted this department be and how I wanted it to work as a group, and knowing again what we've come to consensus about here are three categories of leadership we need. It just didn't make sense. It was brutal. And she'll never forgive me.

Between the fall of 2008, when the financial crisis in the United States began and 2011 Miguel has seen his entire network of museum education colleagues leave their museums, either through layoffs, restructuring, or people taking positions in other states. This has left him feeling isolated as a leader. Although many of those colleagues were replaced with new people, the mechanisms for conversation among them take a back seat to other internal pressures within each institution:

> I think what I've been lacking is the conversation about that sort of thing (current trends in the museum field). More than anything. That's where I feel like I'm not keeping up. Who's doing what? Where? Other than what I'm reading. I'm just not as in touch with that. Initially, when I came into this position, the directors of all the institutions were a good place to talk and that sort of thing, but I think that everybody's feeling pressures. And it has been difficult to keep that group cohesive over the last year and a half. People have missed more meetings more frequently. We would get a good topic on the agenda, and then half the people wouldn't be able to come, for whatever reason.

Shared Themes Emerge: Preparation, Isolation and Knowledge Gaps

After examining data gathered from interviews, written reflections, observations and workshops, I found that answers to the questions I posed at the beginning of this chapter did not enable me to make sense of my data. In the end, a set of themes emerged that crossed all the participants' work. These themes bound them together as leaders, and they were: Preparation, isolation, and gaps in knowledge.

First, each leader talked about how he or she learned to lead, either by formal preparation such as a graduate program or by informal experiences and trial-by-fire. Four of the six participants obtained Masters degrees in education, one obtained an Masters degree in a science content area, and one has no graduate degree at all, but he has about ten more years of full-time museum experience than the rest. All shared how he or she rose through the ranks of their institutions, some from the very bottom and others on a fast track, and each of those paths included their share of struggle – for a paycheck, for quality work experiences, for legitimacy. Those experiences shaped them, gave them grit and perseverance to keep going, and tapped into each of their mission-driven personalities.

Second, the leaders said that they felt isolated in their leadership. They wondered how other leaders in similar positions did their work. They felt like they operated in the dark, cut off from their peers.

And third, the leaders shared their concerns about their own knowledge gaps; whether it's a gap in knowledge about how best to conduct research and measure impact, or how to ultimately run an entire museum, each leader recognizes that he or she has much more to learn.

My deep examination of each individual was critical in helping me to understand and learn from them, but it is the themes they shared upon my examination of them as a group that helped me to shape the first theory I am introducing into this dissertation, which I will explore in the next chapter: Each individual is leading from the middle of his or her organization and as such, each must lead concurrently in more than one direction in order to be successful.

CHAPTER FIVE

LEADING FROM THE MIDDLE

Introduction

When I left my post as Director of Education in a science museum in 2005, I did so because I felt I had hit some kind of professional ceiling. My experience in leadership helped me to build a knowledge base about staff supervision, organizational structure, strategic thinking and visioning. Over time I developed a thick skin to handle the demands of the job. Yet I knew I had large knowledge gaps to fill. Much like the leaders in this study, I often felt as though I was leading on the fly, with no real foundation in anything to keep myself grounded, and with no framework for making decisions rooted in anything more than my gut. What follows in this chapter is an attempt at identifying the elements of the foundation I think leaders like me and my participants need. In Chapter Four I introduced the idea of the shared themes of preparation, isolation and knowledge gaps. An analysis of these themes led me to the first theory I formulated: That leadership for museum educators requires leading in multiple directions at once. This chapter is an exploration of that theory as lived through the practice of my participants.

As I have indicated, none of the leaders in this study is situated at the helm of his/her institution. Some sit at the right hand of the museum president and are instrumental in determining museum initiatives, priorities, and directions. Others appear to be on a second or third-tier of leadership with significantly less power and authority to lead institutional direction. Regardless of these power constructs, all of these leaders are essentially leading from the middle of their organizations. In addition to leading IN their departments, these leaders must effectively lead UP, ACROSS, and OUT. In this chapter

I will define the settings where leadership is practiced: 'Leading IN,' 'Leading UP,' 'Leading ACROSS,' and 'Leading OUT.' I will also place each participant into the context of his or her institution's organizational structure by introducing the concept of 'Leadership Tiers.' Finally, I will provide examples and analysis of each participant's success in leading in the 'UP,' 'ACROSS,' and 'OUT' settings, saving examples of 'Leading IN' for deeper analysis in Chapter Six.

Fig. 1: Leadership Settings

Leadership Settings

Leading IN describes the ways in which these participants guide their own departments in the educational work of the museum. In some museums the education department can be very large, while in small museums the education department can be as small as a department of one. In some cases, leadership of the education department at a Vice-President level can also include leading other departments such as guest services or community outreach. When examining this leadership setting, questions about staff

and program management, tools and strategies, scope of work and other day-to-day practices emerge. Additionally, questions about teaching and learning permeate this leadership setting.

Leading UP describes the ways in which the participants profiled in Chapter Four provide leadership and guidance to the president or CEO's of their respective institution. Other stakeholders included in this leadership hierarchy are: Institutional boards of trustees, institutional advisory boards, the various board-level committees, and major donors. In examining this area of leadership, I focused on questions related to access and influence:

- Where does this leader sit in the institutional hierarchy?
- What kind of relationship do these leaders have with their presidents or CEOs? Are they empowered to provide guidance to the president? How much access do they have to the president?
- How much access do these leaders have to boards of trustees, institutional advisory boards, and to donors?
- In what ways, if any, do the leaders in this study play a role in helping the president and other stakeholders at this level to see the visitor as a learner?

Leading ACROSS describes the ways in which the participants in this study provide leadership among their colleagues at similar hierarchical levels within their museum's organizational structure. Depending on the museum size there may be several Vice Presidents, Directors, or Curators, or there may be only a few. When examining this facet of leadership, questions about relationships and peer leadership were explored:

- In what ways, if any, do the leaders in this study drive institutional directions or initiatives centered on visitor learning that other leaders in the institution follow?
- In what ways are they a leader of leaders?
- If there are pockets of resistance to this leader, from where does such resistance stem?
- If there are pockets of success in leading across, how are those successful relationships cultivated and maintained?

Leading OUT describes the ways in which these participants work in a leadership capacity with other leaders outside the institution such as community organizations, school districts, government agencies, etc. Leading OUT also includes the ways in which these leaders play a role in leading the museum education profession itself. Among the areas for questioning were:

- In what ways, if any, are the leaders in this study actively involved in local, regional or national initiatives and organizations?
- In what ways, if any, do these leaders share their practice with other educational leaders at other institutions?
- In what ways, if any, do these leaders help articulate the public value of museums?

When taken as a whole, the settings where these participants lead represent a complex system of leadership for the effective leader. Ignoring one or more leadership settings, or not being strategic and visionary in one or more leadership settings can lead to marginalization of the individual or the department, as I will demonstrate in the examples of practice that follow.

Leadership Tiers in Museums

Each institution has its own organizational structure, but it is important to note where the leaders in this study are positioned in terms of hierarchy and, therefore, within the formal power structure. Figures 2 and 3 below describe in general terms the levels of power and influence held by positions within each of the institutions in this study. In theory, tier one represents the most amount of power and influence, with each successive tier representing slightly less power and influence. Admittedly the concept of leadership tiers is less organic than the other concepts I explore in this chapter, but I could not help but feel that the leaders in this study often bumped up against this rigid hierarchy when trying to lead in multiple directions. Without acknowledging this formal, traditional structure, the idea of leading in multiple directions might appear too academic or not rooted enough in the reality and practice for the individuals in my study.

Tiers	**Titles**	**Participants**
One	President, Chief Executive Officer, Board of Trustees	
Two	Vice-President, Chief Financial Officer, Chief Operating Officer, Curator	Miguel, Noelle, Rebecca
Three	Associate Vice President, Director	Ana
Four	Associate Directors, Assistant Curators	Monique
Five	Managers, Supervisors	
Six	Assistant Managers, Coordinators	
Seven	Full- and Part-time staff, docents	

Fig. 2: Basic museum organizational structure found in five out of six settings

Tiers	Titles	Participant
One	Director, Scholarly Advisory Board	
Two	Coordinator, Curator	Laura
Three	Full time staff	
Four	Part-time staff and paid Docents	

Fig. 3: Organizational structure for small settlement house museum

Examples of Practice

Now that the concepts of Leadership Settings and Leadership Tiers have been introduced, I provide examples of practice for each of the participants in the study. As a reminder to the reader, I have purposefully left out a thorough examination of the Leading IN setting and will explore that in detail in Chapter Six.

Leading UP: Examples of Practice

The participants in this study were essentially at opposite ends of the spectrum in terms of success in leading UP. Miguel, Noelle, and Ana all shared examples of access and influence with their museum presidents, while Rebecca and Monique have little to no access to their presidents. Laura has unlimited access to her president but appears to possess little to no influence.

Miguel, Noelle and Ana each described their relationships with their presidents as being open, honest, and productive. Each has easy access to their president, and there are both formal and informal structures in place that allow them to communicate effectively and often with their president. In two of the cases, the participants described their president as a mentor.

Miguel's relationship with his president is unique in that he sees flaws in her leadership and is in a position to offer guidance to his president.

> She [the president of the museum] just doesn't have a presence. As head of the [city-wide] Education Committee, I go to the president meetings. I watched Mary (the previous president) at those [meetings] and whether or not I agreed with the things that she did, you knew [she] was there and she contributed to the conversation for good or bad. I think [the current president] struggles with that. We had my review a week ago, and I [brought] that up to her. She said she really appreciated that and she would talk further about it. But we haven't had chance to talk further about it since then. But I did feel like I could bring it up with her, and that was my biggest concern. I feel like, when you're in the room with those guys, and it is those guys, that it does worry me a little bit that her voice is not going to be heard. Because she does, unfortunately as woman in that group, have to make an effort to be heard.

In Miguel's case his relationship with his president enables him to express his concern about the museum's ineffective business model, but he admits they are both at a loss about how to change the business model.

> The business model that we operate in right now is one that makes me very nervous long-term for the institution as a whole. And because of constant turnovers in the people who would be working to redefine where you get that funding in external affairs, we really haven't done anything to change the way it's been funded over the last 10 years. We rely a lot on the [major donor]. The fact that we never developed an endowment of any sort [is troubling]. If you get hit with your endowment, that hurts, but at least it gives you some sort of money that you know you're going to get, even if it gets reduced. When 20% of our budget relies on one family, when 20% of our budget relies on Park District revenue, when 20% of our budget relies on one event, those are three single things right there that we only have so much control over. Everyone acknowledges we have to change it but. . . they don't know how.

Noelle's relationship with her president is that of a true partner, and as such, Noelle is given every opportunity to lead UP. Together they plan agendas for board meetings, make presentations to advisory groups, etc. Such a close working relationship has enabled Noelle to succeed in advocating for more staff and in being strategic in the museum-wide budgeting process.

In some ways Noelle is fortunate to be in an institution without an actual collection. As a leader in a children's museum Noelle does not have the same struggle that other education department leaders in museums experience when it comes to jockeying for power at the leadership table. Further, the president of Noelle's museum rose from the ranks of the education department, and the institutional mission – learning through play – permeates the entire culture. Given these advantages, Noelle is a strong advocate for her department. Below, I provide some examples.

She effectively demonstrated the need for a new position in her department shortly after becoming the Vice-President, thus opening up a new revenue stream for the institution:

> We added a full-time person to just oversee teacher educator programs, and then under that umbrella we added our part-time contract staff to really be out facilitating programs for adults. So we increased a bit. It wasn't very hard [to justify the position] because it was very clear that the revenue would we would bring in for that program more than paid for the person who was overseeing it. Not in a ridiculously lucrative way, but that person's salary was certainly covered by additional revenue.

Noelle knows how to manage her department's budget, how to keep costs down without compromising programming, and how to make a profit:

> Every year the way our education budget is we have been increasing our revenue goals. Our team is almost unbelievably good at keeping costs down. Our biggest cost is staffing. We run the programs on something like ten cents a person. So education budgeting has always been very interesting. We do, in the end, actually make a profit, if you just support what our team costs versus what would bring in. So yes, there has been increasing demand to bring in more revenue.

When asked if Noelle had the authority to push for doing less in a given year (and potentially bringing in less revenue as a result), she responded:

> I think I would have significant authority to do that with good reason. With being able to back it up with the appropriate, wise or well thought-out reasoning for doing it, yes, absolutely. And, in fact, [the president] has made that recommendation to all of us before. And she falls victim to the same thing. We all do it. We all say we are going to cut back and do it better. Then, we all say yes to the 50 ideas that came up last week. So, because I know she is also on the same page about that, I know that it's something that we really could get done if we figured out how to really make it happen.

Ana's case is slightly different from the others in this study in that her institution is very small, so she has easier access to the president. Ana's title is "Director," which places her on the third tier at the leadership level, however her department is the largest in the institution and this gives her an advantage. Further, her institution was founded by a group of educators and the original vision of this ethnic arts museum has not changed since its founding. Ana describes her president as her mentor. "I think [he] trusts me a lot and he knows that I've grown professionally a whole lot. I know that there is this mutual respect." It appears that [the president] is the main decision maker for institutional direction, but he also he relies on the data, experience and recommendations of his senior staff.

Ana has access to her board of trustees, but not to the same extent as Noelle or Miguel:

> I have made presentations to the board years back, it's not something that I don't do. But in the past couple of years I have not done much work with them. Now that we are undergoing strategic planning, there's a lot more contact. The board sees our business director at every meeting and our development director at every meeting. Education or visual arts would be once a year, [or] invited in for special meetings.

Rebecca, Monique and Laura all describe the ways in which they have significantly less power and authority to lead UP. Each is considered to be at a second- or third-tier level of leadership, each struggles with how their departments are perceived, and each has limited power to affect change. Most surprising here is that Rebecca is a tier two Vice-President while Monique and Laura are both lower on their institutional tier structures.

Given Rebecca's title, she has remarkably little access to the president and therefore is very limited her power to affect change.

Rebecca:

> [The President] is an animal person. And we are from two [different planets]. He's from Mars. I'm from Venus. We don't have anything in common and even the things we do have in common, like kids, I just have a hard time relating to him. And that is true of [the president] with a lot of people. He is an introvert. He's kind of hard to know. And he equally does not have an understanding of my world -- the education world. So I am sure that he feels equally incompetent or sort of insecure. Maybe. I don't know. He probably would never say that, but I think his understanding is very superficial of what actually happens over here and how important it is. Not how important it is, he knows how important it is because we tell him. I think he's a strong leader, his is probably not the kind of leader I see myself being.

Rebecca also struggles with the entire institutional culture:

> I came from an environment where I had autonomy and freedom to pretty much do whatever it was that [I] wanted to do. We always knew, okay we can't do that without asking somebody or at least run it past so and so. Here there is a lot of --not checks and balances because that connotes logic. The culture is more restrictive and not as forgiving. Here it is more cautious. I don't like that. It's not comfortable with me.

Monique has no access to her president, and there are no formal or informal structures in place for her to have the same kinds of opportunity to lead UP as some of her counterparts in this study do. Her leadership is centered more departmentally. Her department is in triage mode after years of ineffective leadership from a previous leader. Her work is, in part, about repairing the damaged perception of her department and making up for the fact that her department was left behind.

Laura is hampered by a pacesetting leader who provides her no opportunity to lead UP:

> The biggest resistance I am faced with in my institution's pacesetting environment is my director, who often chooses to innovate rather than

> build capacity. I find the innovation to be very exciting and I deeply enjoy our work together, but I recognize that it is at the expense of the capacity building that I think would benefit the institution tremendously. Because I am also drawn toward innovation more than capacity building, I don't think I challenge this notion as much as I should. In our office environment, capacity building can sometimes be seen as "boring" work, rather than something that would support our innovation. In order to work with my director on this issue I tend to choose my battles very carefully, and much of the capacity building I either ask my assistant to handle (creating organized systems, gathering feedback, implementing new ideas), or I build capacity among our staff of educators in the little time I have.

In one instance during this study I was invited to observe Laura give a presentation to her institutional advisory board, the intellectual counsel for the museum whose membership consists mostly of university faculty and a few outside community activists. When describing in an interview how that opportunity came about, Laura shared this story:

Laura: There was one advisory board meeting a year and a half ago where we all introduced ourselves; it was like a big turnover in the staff. I talked a little bit about the work we were doing and that was it. I just can't think of any other examples where it wasn't [the director] who was talking about the program. The reason it happened this way, I think, is that [she] couldn't defend the program because she hasn't attended any of them. And so I don't think she spent the kind of time that I have theorizing it and thinking about it. She told me that she was really stumped when she's at feminist conferences, or when some of the people on the board come to her and ask her questions about it. She really can't say anything, so I really felt that she put me up in front of the board in order to defend it myself which maybe is a good thing, but I also felt like that's maybe not my job to do that with the board.

TN: Why would you think that's not your job?

Laura: Well just because I think it's maybe first her job. Certainly I'm happy to do it, but I feel like that's one of the very few areas where I haven't had the support because she hasn't come to the programs and so she can't really say what it is we are doing. But it worked out well and the end. She really prepped me.

TN: How did she prep you?

Laura: I think she articulated to me that there were some serious concerns and she really told me that I needed to go speak to a number of scholars on campus to make sure that my theoretical arguments were sound. This is how it goes as we have a scholarly board. It's a little different than a different kind of board. I told her that I've been doing this work for two years I've been talking to people the entire time and I said, 'What is it that you mean? Do you need me to talk to your people? What is needed here?' And she said, 'As long as you're doing it, that's okay, but you're coming up against the head of gender women's studies program on campus and she has some serious concerns.'

TN: Was she the one of challenging you a little bit? I was expecting a lot more pushback, honestly.

Laura: I was, too.

TN: But I think it's honestly a really progressive group of people. That's how it appeared to me to be. But was she the one that was kind of pushing back a little bit?

Laura: She was, and I was totally prepared for that. In fact I to tried to meet with her before the meeting so that I wasn't blindsided by her arguments or by her issues. We didn't really get a chance to meet but I think even the fact that I had reached out to her was helpful in defusing the situation.

TN: Was that your call, or was something that [the director] advised you to do?

Laura: No, she was telling me to talk to everyone else, I think because she was hoping that I would glean from them what the issue was. But I thought that was crazy and so I said, 'How about if I just talked to Barbara? And she said, 'Oh yeah, that's a good idea.'

Leading ACROSS: Examples of Practice

All the participants in this study made efforts at leading ACROSS, some with more success than others. For some, leading ACROSS means changing internal negative perceptions about their department; for others, leading ACROSS means leading by example; and for still others, leading ACROSS means peer mentoring with leaders of other departments, and leading institutional initiatives.

Monique and Rebecca both spend their time attempting to change how their department is perceived by the rest of the institution.

Monique:

> Oh, I don't know where to start. A lot of negative things came to mind. I'm overwhelmed with the negative perceptions that exist. So let me start with the positive perspectives. I believe that other people in the building understand [long pause] the fundamental value of what we do. In terms of helping us fulfill our mission, bringing in the dollars that help support the mission, reaching students and school teachers and students. I think they have a fundamental understanding of that. But a lot of the negative perception is tied to the fact that we do so much more than what they fundamentally understand that they don't really understand why we do it. They don't understand the value of it. They see us as changing often, where for us it's about us learning from our learners. And not doing a program here, or a program there, but taking a program a through iterative development that helps us reach our learning goals better. So, because it is so much more than what they fundamentally think we to do or should be doing, there is a huge. . . well, poor relations between our department and other departments.

Rebecca:

> I think that we have made tremendous progress over last two years. When I first came in I think we [the education department] were nonexistent and if anything sort of a nuisance. We weren't doing anything for the organization. Now that we are viewed by most departments as a strong partner and as a reliable service and support provider (to support their initiatives), it's a complete 180. We have more to accomplish.

Laura:

As a member of a very small institution, opportunities for Laura to directly lead ACROSS are limited to more the managerial aspects of leadership. Laura works on improving systems with her colleagues (tour booking, charging fees, etc.) However, given Laura's access to the president, she is also leads by example through her innovative programs. Laura's strong desire to "change museum practices" is her primary focus in this area. Laura's work with her president is around moving the institution itself away from a scholarly research site and toward becoming a community-based museum that takes a progressive stance on social issues. She has done this, bringing the other staff at

the museum along with her, through the civic dialogue programs and through community curating of exhibits and programs.

Ana:

Ana tends to lead ACROSS by example:

> I wish that I could transfer [some of what I've learned] to the rest of the museum. I think that some of the staff that have been here since the beginning have a really hard time understanding that things are a little different now. This is several people, even directors. They are uncomfortable with even the way a proposal has to be written nowadays and what a foundation expects to see. I think because I was so young it was just a new situation for me, I had to learn extra fast and I became really comfortable with it. I've been very honest along the way, too, about what I do know and what I don't know. And even a lot of program officers from foundations are able to see that. I think they come and visit me two years later and go, 'Wow.' So I feel like working with funders and having site visits with the funders over the years has given me experience that I do sometimes wish I could transfer on because other departments don't have that.

But Ana shies away from being a leader of leaders:

> I think all of us are guided by mission and we're really clear about that. But it's the way that people go about different things might not be the way that I would go about doing something. That sometimes for me is really frustrating. I have really high expectations of everybody. That may not always match. When it comes to our department that bar is never lowered, it's only raised. I try to raise the bar on the other end. There are times when there's probably nothing I can do, move on. I'm not going to. . .you know, that's not. . . if it's not my jurisdiction, if it's causing me stress, then [I don't] try to save or interfere. I can't afford to.

Further, Ana does not believe she has the power or authority to lead ACROSS:

> Although I think I can try to become a better leader for the staff I work with, I don't think I could be very successful outside of my department. There are different forces and perhaps other leaders who have very influential roles that could make it very difficult to navigate. At his point, I

> think that sharing some of this information on leadership styles with other directors might prove useful. If only I can find the time and energy to walk against pretty strong wind!

Miguel:

Miguel is a true leader of leaders. In addition to leading UP with the museum president, Miguel leads ACROSS by mentoring the Chief Financial Officer, who he describes as:

> Really young. And he's really good at the numbers. He really knows that stuff. He's got it down, and he asks really good, hard questions of us about our budgets. But when he's nervous about something or afraid something's not going the right way, he's very hesitant to speak up to the board or to [the president], about money that's being spent. So I've tried to work with him on that. And he's given me a much better sense across the board of how the money gets in here, and where it's going.

Miguel is also not afraid to build bridges where there are rough waters. When describing how he works with the exhibits department, he shares his desire to find common ground, as opposed to marking territory:

> [The exhibits director] and I get into it a little bit -- primarily where comes to public programs. [He] really wanted to prove himself, and so [one of his staff members] wasn't really talking to us. She would do a program and then we would say, 'You know, we did that two years ago. Here's a whole stack of information.' It took a while to break down the barrier, but we've started to work better on the public programs side of it. We struggle still with the exhibits piece. [We] find out about things too late to really be part of the process. That's been an issue. If we'd known I would've said, 'Let's do this one because it ties into a bunch of stuff are doing here. It's the perfect connection.' You know, [the exhibits director] has done a lot of nice things. But it's that working in my area sort of thing we have to get past.

Noelle:

Noelle is in a position to lead specific institution-wide initiatives. Noelle's department comprises 75% of the total staff at her museum, she has easy and influential

access to the president and the board of trustees, and has the largest share of the institutional budget. An example of Noelle's ability to lead ACROSS can be seen in an effort she led to create more reliable measures of success for her institution. Noelle and her president worked with an outside consultant to create a strategic plan for evaluation. "What they helped us come up with was a set of measures of success under four categories that all lead back to our mission and our set of foundational documents. We have a number of position papers that we have written so our measures of success fall under the categories of 'play and learning,' 'the role of the adults' here at the museum, 'access and inclusion', and 'diversity." At the time of the interview, Noelle was working on writing a federal grant to seek funding to implement the plan they came up with. This project required Noelle to get buy-in from her colleagues as it will involve the entire institution.

Leading OUT: Examples of Practice

Leadership in this area is practiced by almost all of the participants in this study, and focus tends to fall in one or two areas, but not both: Miguel and Rebecca devote time to leading the profession while Noelle, Ana and Laura devote time to leading in the community. At the time of this study, Monique was focused internally and therefore did not discuss any practice in leading OUT.

Examples of Practice in Leading the Profession

Rebecca is a course instructor for a program offered through a partnership between George Mason University and the American Zoological Association (AZA). For the last two years Rebecca has worked with other course instructors to design and teach an environmental education course to an increasingly diverse audience of students. In this

case the students are diverse in that some are mid-career museum educators while others are graduate students/professionals taking this course as a requirement of the AZA Graduate Program in Zoo and Aquarium Leadership. While this opportunity represents a professional leadership opportunity for her, Rebecca admits that she struggles to differentiate her instruction for this wider audience of professionals:

> Most people who are pursuing their Masters degrees are probably not brand-new to the industry, so they have more experience. They also are taking this course because it is a requirement of the Masters program and therefore it is very possible that they are not educators. So now we have this mixed bag where we have people who are brand-new to the industry, but they have that potential. They're sort of rising stars. Then we have the folks who are sort of, you know, maybe midcareer or early to midcareer, but they might be in animal care, or they might be conservation. So from our perspective as instructors and curriculum designers it is really challenging and it sort of like you're damned if you do and you're damned if you don't.

Miguel provides leadership to the profession in more high profile ways, and in a way that is centered on leading the profession in a geographically specific area. Miguel is the Chair of the Education Directors Committee for a network of museums that all receive significant general operating funds through the city's park district. This network of museums is required to meet on multiple levels ranging from museum presidents to education directors to marketing and PR directors. Because Miguel is the chair of his group he is required to attend the meetings of the museum presidents, which gives him a unique opportunity to observe leadership at this level. He has grown in confidence as a result:

> Now I've gotten to know the presidents in the city and feel pretty comfortable around these guys. One of things I was concerned about is whether or not I felt like I could assert myself in this group. I'm not concerned about that anymore. Some of these guys I have heard about for

> years and years and never had much interaction with. Seeing how they interact seeing what they do. . . I'm not as afraid of working with those people.

Miguel is also responsible for convening monthly meetings of all the education department leaders of all the museums in this network. However, Miguel struggles in his leadership of the this group:

> When I came into this position, the directors of all the institutions were a good place to talk and that sort of thing, but I think that everybody's feeling pressures. And it has been difficult to keep that group cohesive over the last year and a half. People have missed more meetings more frequently. We would get a good topic on the agenda, and then half the people wouldn't be able to come, for whatever reason. We ranked lots of topics we all wanted to work with. 'Let's start at the top: board relations is one you want to talk about, you want to talk about how you're funding programs. Okay, here it is on the agenda.' And a day or two before hand, [I hear] 'I've got to do this, I've got to do that, I can't come to the meeting. I want to do this, but I can't be there.'

In addition, Miguel has just assumed the Chair of the education committee for a very large, regional consortium of several hundred environmental organizations. As Chair Miguel will expand his leadership network considerably, and will have significant opportunity to advocate for the profession if he plays his cards right.

Examples of Practice in Leading with the Community:

For all the challenges Laura has in the area of leadership this is an area where her personal goals and her professional goals are aligned. Laura involves a wide variety of communities in the curation of exhibits and programs at her museum. More than simply involving the community, Laura relies on community curating practices, or what Lynn Dierking (2010) termed as museums being FOR and WITH communities (p. 11) to determine the content, scope and products that come out of every project. In addition to the innovative programs I described in chapter four, Laura is now managing a new

partnership between her museum and a community-organizing offshoot of a notoriously violent street gang. Progressive leaders of this gang came together in the late 1960s and early 1970s to help clean up the neighborhoods in the city and lower the occurrence of violent crimes. Laura's work in this partnership is to help them open a new museum in their neighborhood.

Ana's experience with her local neighborhood educational task force has helped shape her as a leader in this area. Through her work on this task force Ana has expanded her network of professionals, increasing her access to school principals, city funders, and local businesses. She has also raised the profile of her museum through collaborative efforts and projects undertaken by the task force. Here she can learn first-hand about community challenges, determine collaborative ways to meet those challenges, and increase the relevancy of her museum in the process.

Noelle works in the community in a slightly different capacity. Working with the leadership in the large urban school district in her community Noelle created a partnership centered on professional development for the district's early childhood teachers:

> We actually built a large scale partnership program with them called Early Education for All that was specifically targeting their pre-kindergarten programs. It was really collaborative as far as sitting down with the top office of early childhood education and the office specialized services and special education. [We] figured out what they needed and specifically designed a program for them that really was about teacher professional development in those classes and differentiated learning. [The children's museum's] approach to learning through play. And they were fully on board. They listened to us, we listen to them, and so I actually was really feeling like that was an example of a program that truly was us partnering with the school system, understanding the needs, and building something together that was successful. So in those cases, I feel like we are working together. We are at the table together.

Here Noelle indicates she is up against a significant challenge. Much like other very large, urban school districts, it can be exceedingly difficult to foster any systemic change in the school system from the position of a service provider. When pressed about whether or not Noelle's work with this district has succeeded in changing how the district both values and works with the museum, we had the following exchange:

TN: Do you feel like you have made strides toward some kind of systemic change in early childhood through [the large urban school district]?

Noelle: I think we could, tomorrow. [If we] reached greater numbers of children and with more institutions involved doing similar things. Yes. What we've done just there, no.

TN: I often see it like a wooden footbridge and museums are one side and [the large urban school district] is on the other. Museums are forever crossing that footbridge to go and play with [the large urban school district]. They never cross the footbridge to play with museums. You might have a couple of teachers --like teacher advisory board members -- and they are your biggest champions, and so they will come and play, but then the principles calls. They ring the bell it's time to come back home. And so why is it that we are not meeting in the middle of that footbridge?

Noelle: It's so interesting you say that. One of the conversations I had with [the large urban school district] higher up administration referred to -- we were talking to them about what kind of partnership we could do next with them -- and they used the term, 'Well, send us your wish list' of what we want to do for them. And it was sort of exactly what you're saying. They should be sending us their wish lists of what they would like us to do with their students on how we can be part of it. So it's sort of like, 'No, this is not about us getting what we need out of you, it's the partnership.' So while we have those moments of truly good partnership with them where I feel like it is being in the middle then – those moments where it absolutely is like we're. . . (Laughs). . . Yeah. So that's an ongoing challenge for sure.

Conclusion

For much of the last five years I focused my energies on understanding why museums to appear measure success on attendance and dollars to the apparent exclusion of teaching and learning. I made an assumption which, thanks to what I learned from the

participants in this study, I was forced to acknowledge, examine, and ultimately come to terms with. I assumed that teaching and learning is the only thing that leaders of museum educators needed to be experts about. I believed that if one knew everything there was to know about what good teaching in museums was, and if one built successful learning communities in their departments, and if one knew how to build budgets that support teaching and learning as a first priority over making a profit, that it would be enough to move the profession and the museum closer toward achieving a new level of public value. I believed that factors like relationships, politics, and finances could be lumped into a single domain or sphere of influence: The teaching and learning domain. I was incomplete in my thinking.

How did I come to understand that there was more to leading in museum education than teaching and learning? When discussing readings in class, engaging museum educators in conversation about the profession, and listening to and observing the participants in this study, I experienced that familiar feeling of hitting a professional barrier whenever the conversation moved toward topics of money, politics and power. Such issues are not exclusive of teaching and learning, but they require a different set of skills that are not part of the more traditional aspects of teaching and learning in museums. Thanks to the participants in this study and the hundreds of museum educators who shared their experiences with me over the past five years, I've come to understand that these leaders need to comprehend existing business models and create new business models if they are to guide museums toward being truly mission driven. These leaders need to understand the politics both within their institution and without if they are to advocate for their staff and for the visitor.

An examination of leadership settings (IN, UP, ACROSS and OUT) led me to my next theory, which I explore in depth in Chapter Six. I could not ignore the fact the participants in this study had to lead others outside their departments. I could not ignore the fact that teaching and learning is not the only domain in which they operate. There are other domains that these leaders must be proficient in if they are to affect institutional change. To ignore the other domains is to further marginalize both the department and the leader from the rest of the institution and the community. In Chapter Six I identify four domains of professional practice, and I believe it is the LENS that remains the same no matter what domain one is operating in at any given moment. For leaders of museum educators, the lens through which all their work is done is that of the visitor as a learner.

CHAPTER SIX

DOMAINS OF PRACTICE: AN EMERGING LEADERSHIP FRAMEWORK FOR MUSEUM EDUCATORS

Introduction

Chapter Four offered an introduction to each participant in this study, an analysis of their competencies and the conditions in which they work, and an overview of the culture of their institution. This analysis also shed light on themes that all participants shared: Preparation, isolation, and knowledge gaps. In Chapter Five I grounded each leader in the context of his or her institutional hierarchy. I introduced the idea of leadership settings, in particular leading IN, UP, ACROSS and OUT. I also unearthed and debunked a hidden assumption I held about spheres of influence. In this chapter I introduce a framework that integrates leadership settings with what I believe are the particular domains of leadership practice for the participants in this study.

Codifying Leadership Practice

I drew inspiration for codifying practice from Charlotte Danielson's work, in particular her 2006 publication, *Teacher Leadership That Strengthens Professional Practice*, and her 2000 publication, *Teacher Evaluation to Enhance Professional Practice.* In her *Teacher Leadership* publication, Danielson put forth a framework for teacher leadership that spans settings. By "settings," Danielson means the places where teacher leadership is exhibited such as, "Within one's own instructional team or department, throughout the school or beyond the school in the district, the state, or even the entire nation" (Danielson, 2006, p. 26). In her *Professional Practice* publication, Danielson identifies the specific domains where teacher leadership practice can be

measured and evaluated. They are: Planning and Preparation, the Classroom Environment, Professional Responsibilities and Instruction. Through of these contributions, Danielson provided a framework for the profession to establish shared definitions of good teaching practice, establish a teacher evaluation system based on measurable standards of excellence within each domain, and called for a raising of the professional bar for all classroom teachers.

At several points along my research path I tried to identify the areas where leaders of museum educators did their work. A review of my papers submitted for courses in my program shows my attempts at codifying practice, but these attempts were not grounded in a research methodology that included a deep and systemic analysis of practitioner's experiences. Rather, the attempts were based on my own experiences as a leader, and on anecdotal information I gathered from a broad spectrum of museum educators through informal conversations.

In the Spring of 2008 I created a matrix that includes some of the elements I eventually placed into more formal domains, however the matrix still seemed to be missing important elements of the leader's work. Areas addressed included: Advocacy, Creating a Learning Organization, Management, and Change Leadership. In the center of this work is the Visitor as a Learner, but in the matrix the visitor was treated as almost a separate area or domain. Something was missing. This matrix only addressed what I've now come to understand as the Leading IN setting as it relates to the leader's role in guiding teaching and learning. Again, it's important to point out here that the concept of leadership settings and domains had not been established in my thinking in 2008. Something in my gut told me the matrix was incomplete. Nagging questions remained:

Where did this matrix show the leader working with the institutional President and Board of Trustees? Where does it show how the leader drives budgeting models? Where does it show how the leader works with the community and increases the public value of their institution as a result of such deep engagement? Where does it show the leader leading the profession?

For the reminder of my doctoral coursework I continued to work informally with museum educators to better understand their scope of work. By situating myself as an observer of their practice I was able to gather more data which eventually led me to my research topic for dissertation. In selecting grounded theory methodology I was able to incorporate all of the data I accumulated into my theory building as I systematically examined my own papers and the data gathered from the participants in my study. Armed with my own experiences as a leader, a depth of data gathered from five years of research, and a methodological approach, I allowed the data to show me the best way to codify practice rather than trying to force the data into a pre-existing frame.

I mentioned the Danielson work because she inspired me to make sense of a practice that had not yet been articulated. But, while I believe the Danielson leadership settings and domains of practice work in school settings, they seem ill-suited to guide leaders of museum educators. The contexts, cultures and conditions of leading in museums are quite different than leading in a classroom or a school building. The wide array of audiences served, the scope of work for an individual educator ranging from lesson planning to exhibit development, and even the collaborative nature of museum teaching versus isolated practice in a classroom are just some of the ways that museum teaching differs from school teaching. Chapter Five led me to identifying leadership

settings. Taking into consideration the settings in which leadership is exhibited, I moved next to identify what I believe are specific domains where these leaders demonstrate their professional practice.

Leadership Settings in Museums

In Chapter Five I examined the different leadership settings for museum educators. I review them again in this chapter for two reasons:

1. I did not address the Leading IN setting in the previous chapter. In this chapter I will provide examples of Leading IN and compare this leadership setting to the others I identified in Chapter Five.
2. I believe it is important not to treat leadership settings as a separate concept but rather to show how they relate to the domains I'm proposing.

Leading UP describes the ways in which the participants in this study provide leadership and guidance to the president or CEO's of their respective institution. Other stakeholders included in this leadership hierarchy are institutional boards of trustees, institutional advisory boards, the various board-level committees, and major donors.

Leading ACROSS describes the ways in which the participants in this study provide leadership among their colleagues at similar hierarchical levels within their museum. Depending on the museum size there may be several Vice Presidents, Directors, or Curators, or there may be only a few.

Leading OUT describes the ways in which these participants work in a leadership capacity with other leaders outside the institution such as community organizations, school districts, government agencies, etc. Leading OUT also includes the ways in which these leaders play a role in leading the profession itself.

Leading IN describes the ways in which these participants guide their own departments in the educational work of the museum. In some museums the education department can be very big and include docents or volunteers among the ranks of paid educators, while in small museums the education department can be as small as a department of one. In some cases, leadership of the education department at a Vice-President level can also include leading other departments involving the public such as guest services or community outreach. Regardless, the majority of work done in this leadership setting can be shown as it relates to the next component in the framework I am introducing: Leadership Domains.

Leadership Domains of Professional Practice

The domains described below stem from years spent observing leaders informally in museums and engaging them in conversations about their work. Also reflected in these domains is a depth of literature spanning the disciplines of organizational leadership, schools, businesses, and museums. While the emerging definitions of each domain may appear to have been arrived at easily, they are my most current thinking based on many years of data collection, reflection and writing.

I have identified four domains of professional practice for the participants in my study which I believe encompass the scope of their work and responsibilities. I'm using the traditional definition of the word "domain," which means a sphere of knowledge, influence, or activity. The descriptions of each domain include a sampling of systems that leaders must understand, manage and guide. In addition to the systems I identified informally prior to this dissertation, examples of systems were also provided by the participants in this study. Some examples emerged in interview transcripts, some in their

reflective writing, and some came from our two workshops together where we focused most of our time understanding both the process of leading change and the underlying systems that need examination in order for change to be sustained. I finally hit upon the domains, presented in Figure 4 below. When examining the systems articulated by the participants in my study, the systems fell into categories, which helped me to see all the domains of professional practice for the leaders in this study.

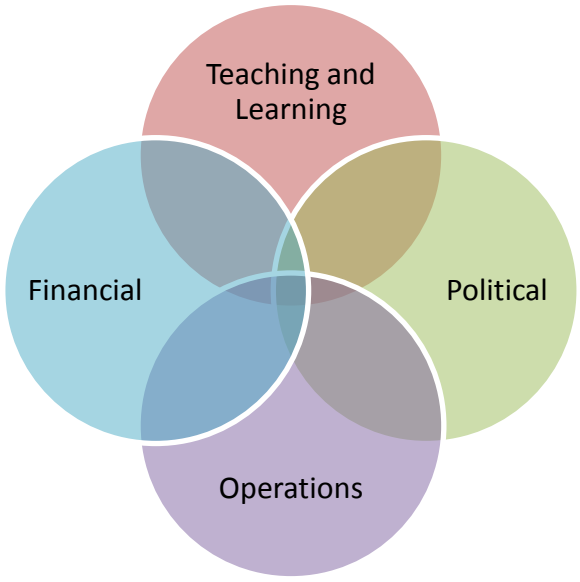

Fig. 4: Domains of Leadership Practice for Museum Educators

Teaching and Learning**:** This domain encompasses all the educational foundations; the curricular elements of teaching and learning from pedagogy to curriculum to instruction. As a reminder, the terms "pedagogy," "curriculum," and "instruction" are school-based terms not used regularly by all museum educators, but I am using them here to underscore that as educators, such practice is, indeed, a part of the work of museum educators. As Tran and King (2007) articulate, the profession itself lacks a shared language for their work. The Teaching and Learning domain also includes all planning, oversight, implementation, evaluation and assessment of learning activities

for both the staff under their supervision and the visitors with which they and their staff engage. The domain focuses on research-based development of shared definitions of good teaching, as well as capacity building practices for staff with the aim of improving practice and measuring impact.

Political: This domain encompasses all the internal and external relationships these leaders cultivate with stakeholders. It includes the ability to form strategic partnerships and demonstrate impact; two areas where many of the participants in my study said they struggle. It also includes knowledge of and involvement in education policy, other public policy, content-area policy (such as environmental policy for science museums), and museum-specific policy (funding for museums, historic preservation, etc.). The extent to which the participants in my study were engaged in policy-related work is limited. Proficiency in this domain also includes having an awareness of legal issues relative to the museum industry such as provenance, de-accession, intellectual property, museum ethics, etc. This domain also includes comprehensive understanding of and participation in the revision of state and national education standards. In this area museum educators are highly aware of state and national standards, but the extent to which their voice is represented in the revision of state and national school standards is very limited.

Financial**:** This domain includes all fiscal elements of the education department and the relationship of program development and staffing to budget planning at the institutional level. It includes budget management, understanding of various business and budgeting models, contract negotiations and compensation, and a capacity for securing

and managing grants from federal, state, and philanthropic sources. The extent to which the participants in my study are involved in this domain of practice varies widely.

Operations: This domain includes all logistical systems related to the visitor experience, a domain in which the participants spend a great deal of their time and energy. It also includes the management of data systems including attendance and registration data. It includes some of the more managerial aspects of leadership including dealing with scheduling, job descriptions, organizational structure, and scope of work for staff. Communication strategies also fall within this domain. This is another area in which the participants appear to spend a lot of time. Communication strategies include marketing educational offerings, participating in museum branding, creating content for museum websites, and participating in offsite events in order to raise awareness about the museum. This domain also includes all internal and external reporting systems.

Leadership Lens: Visitor Learning

Another way in which museums differ from schools as learning environments is that, unlike the school setting, there are competing missions in many museums that place visitor learning as a second, third or even lower priority behind such foci as the collection (living and non-living), the money, and the amusement factors that lead to repeat visitation. Critical to the educational leader in such settings is an unrelenting focus on the visitor as a learner, as opposed to the visitor as a consumer, and an unyielding belief that the visitor is the reason the museum exists as a public institution. Given these competing interests and missions within the museum cultures in this study, the lens through which the participants must view his or her work is that of the visitor as a learner.

When taken altogether, the framework I see emerging includes the specific leadership settings, the domains of professional leadership practice and the lens through which all the leader's work is done. Figure 5 provides this emerging framework.

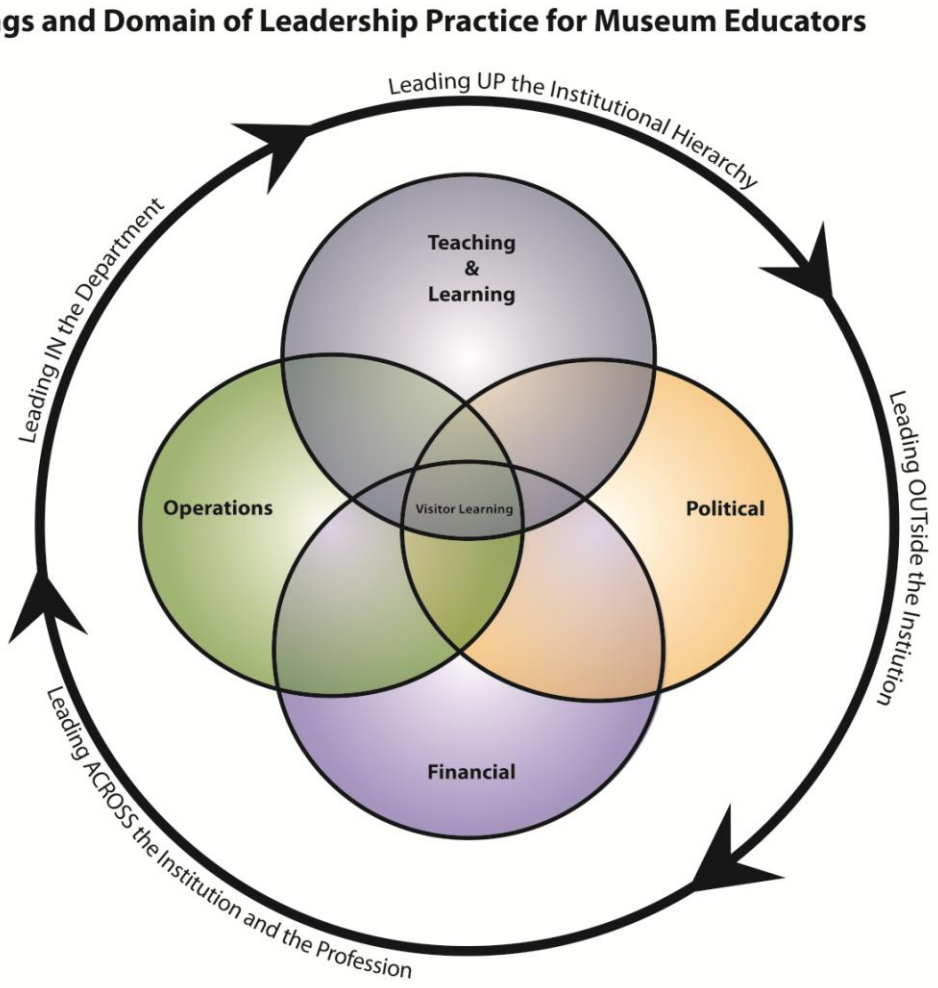

Figure. 5: Settings and Domains of Leadership Practice for Museum Educators

Leadership Domains Lived Out In Practice

What follows is a brief analysis of the participants' practice as lived out in each of the domains presented in Figure 5, starting with examples of best practice, and moving toward examples of struggling practice. Here I will examine incidents where it appears that:

- leadership is practiced across multiple settings and domains concurrently;
- leadership is practiced in a single setting and domain;
- leadership is rooted in one domain but appears to impact other domains; and
- leadership in certain domains appears to be largely ignored by participants.

Lastly, I will provide an analysis regarding domains that appear to be most dominant in practice and which appear to be least dominant among the participants in this study.

Examples of Practice

It appears that some do their best work across multiple settings and domains.

Noelle is undertaking an initiative to introduce an institution-wide strategic plan for evaluation. Enacting this plan required that Noelle first work UP with the president and the board to bring in an outside consultant to put a baseline analysis together. It also required that she work IN to ascertain her staff capacity to lead evaluation efforts and communicate her work. Now that the baseline has been completed, Noelle is working ACROSS to obtain buy-in from other senior leaders in her museum. This work appears to involve all four domains of practice and leadership settings: The Political domain includes communicating UP with the board, with funders, with other outside stakeholders. It also includes demonstrating impact once the plan is in place. The Teaching and Learning domain includes the plan itself; what will be measured, what

successful visitor learning looks like, and how to build capacity for the staff to do this work. The Operations domain includes the logistics involved in collecting and managing the data related to this plan. Finally, the Financial domain includes obtaining initial funds to hire the outside consultants, seeking continued funding through a federal grant application, and building a sustainable plan to continue comprehensive evaluation once the grant is done. Noelle will have to lead in all four settings and domains in order to be successful in this initiative.

Ana joined a neighborhood education task force a few years ago. As a member of this group she has been able to forge collegial relationships with school principals, local business owners, and with representatives of philanthropic organizations. Her work leading UP and OUT and leading in the Political domain has done much to elevate her professional profile as well as that of her museum. It has led to increased access to schools which impacts the Teaching and Learning domain, increased funding to participate in community-wide events which impacts the Financial domain, increased attendance by families in the community which impacts the Operational domain, and more relevancy for her museum which circles back to the Political domain.

Miguel's team members approached him earlier in the year about developing a shared teaching philosophy that spans audiences and program types. When applying this philosophy to the department, (operating in the Teaching and Learning domain) Miguel was quick to realize that a long-standing partnership with a community organization simply didn't fit with the work of his team. In the incident below, Miguel describes and example of leading OUT and working in the Political domain:

> That program has become very product based. What are the things they could walk out of the room with as opposed to what they are learning. Because it's kind of the way that program has been pushed partly with [the community organization]. So it will be interesting this spring trying to see what we can do to adapt at. We'd really like to get it back to something that's more about what the kids are learning, as opposed to showing at the end. When we look at those programs, and how we want to teach, those programs are not there.

Laura's museum is unique in that it is an activist-oriented institution. Therefore some elements of her leadership span multiple domains simultaneously, as opposed to being generated in one domain and impacting other domains as a result. When developing the civic dialogue programs, the content and pedagogy for the programs is rooted in the Teaching and Learning domain, while the recruitment of docents with backgrounds in activist-oriented content (such as feminist theory) is connected to the Political domain, and the new way in which the facility itself is being used in these programs impacts the Operations domain.

It appears that some of their practice in the Teaching and Learning domain has little direct impact on other domains, but is nonetheless important to the function of their department or institution.

Several participants in the study shared incidents describing how they spent time Leading IN by building staff capacity in the Teaching and Learning Domain. The examples provided here do not directly impact or involve the financial, the operational or the political domains:

Miguel admits that he has no established professional development plan for his department. His staff suggested that he and his leadership team began implementing monthly peer-trainings as a form of professional development for his staff. Topics are suggested by the staff, trainings are developed and led by staff, and his department is

invited (although not required) to attend the monthly trainings. In one instance his lead educators created a workshop on science inquiry methods, and in another instance his department arranged a field trip to talk to other educators at a research lab.

Noelle uses her monthly department meetings as time for more formal staff professional development. Announcements and other business are shared through email and by other means, which leaves the entire hour and a half to devote toward building staff capacity for teaching and learning. In one session she described how she and her lead educators planned a workshop around inquiry science teaching methods. They set up learning stations around the room and the department cycled through them. They then discussed strategies for conducting scientific inquiry lessons on the museum floor, in the museum classrooms and in outreach lessons. In another incident the department watched a video of an adult with a child who had a disability and used that video as a jumping off point for discussions about accessibility and inclusion in their educational offerings.

Laura facilitates a two-week intensive training each year for her docents. Much like a college-level class, the docents meet daily for class time where Laura models the tours they will be responsible for leading. The docents have readings and assignments to complete in between classes, and they are also required to meet individually with other staff throughout the institution (including the director) to learn more.

Ana has spent the last two years working with an outside consultant to provide coaching for her department around program evaluation. By using grant money carefully and requiring that her staff take-on some of the data collection activities related to the grant, this outside evaluator has instead used that time to hold regular workshops for the staff on program evaluation methodology. The staff learned how to conduct focus groups

and how to create and analyze surveys. Most recently they focused on creating logic models for their department.

Examples of practice rooted in one domain that directly impacts other domains.

Examples of Practice Rooted in the Political Domain.

Some participants in this study have more experience and practice in this domain than others in this study, which seems to be directly tied to their leadership tier – the higher-up they are in the leadership hierarchy, the more opportunity they appear to have to operate in this domain. However, if their department has already been marginalized (Rebecca's department is an example of this), the leader struggles to find opportunities and access to do work in the political domain.

Noelle has ample opportunity to work in the Political domain: She has regular access to the board of trustees, she and her president co-chair an institution-wide advisory board, and she is actively pursuing partnerships with area ethnic communities, local public service agencies, and the large urban school district in her community. While her work in this area has been successful at bringing people to her museum, Noelle admits that she often ends up saying "yes" to a lot of things and then feeling stretched because she has no framework for helping her understand their capacity to enter into something new. Implications for her growth in the Teaching and Learning domain, the Operational domain and the Financial domain are evident.

Miguel is the chair of a committee of educational leaders from a small but powerful collection of museums that all receive significant general operating funding from the city's park district. In this capacity Miguel has opportunity to position the work

of these organizations strategically and leverage for increased identity for the profession, however Miguel struggles to succeed in this endeavor due to a lack of committed participation among the other leaders on the committee. Attendance at meetings is sporadic, follow-through on initiatives is poor, and some who attend the meetings regularly appear to do so out of compliance more than out of a desire to leverage their collective work. In one instance Miguel shared with me that he is trying to maintain one program that is a multi-institutional partnership with a large urban school district. The original intent of this program was to affect systemic change in the school district to help classroom teachers use museum resources and museum settings more successfully in their teaching. Over the years this program has had less and less funding, less and less commitment on the part of the school district, and museum participation is waning. Out of the ten museums that began dedicating time and staff to this project several years ago, only four museums remain.

Examples of Practice Rooted in the Operations Domain.

The examples of leadership (or lack of leadership) in the Operations domain each revolve around Leading IN by working on departmental structure, as some of the participants in this study appear to spend a lot of time trying to find the right structure to meet their needs.

Prior to Rebecca leading the department at her zoo, the institution changed its organizational structure to create four very large divisions. Rebecca's department is one of three departments (education, animal collections and conservation) that are overseen by one Senior Vice President. Rebecca came on board at a very tumultuous time for the zoo. Financially strapped and reeling after a spate of animal deaths (all of which were by

natural causes as the animal collection is an aging population), the zoo was struggling financially, politically, and operationally. The zoo was in the midst of layoffs when Rebecca arrived. While Rebecca was told her department would be spared, Rebecca saw this challenging time as an opportunity to make drastic changes to her departmental structure and the way her department operates. Rebecca proposed eliminating staff positions, reconfiguring the seasonal positions, and eliminating the docent program entirely. This organizational shift, while rooted in the operation of her department, has had direct implications in the Financial domain, the Political domain, and the Teaching and Learning domain.

Laura's museum sits within the larger structure of a public university, and is housed within its College of Art and Architecture. The college and the university are in the midst of restructuring in the wake of the financial crisis in the states, which means that her museum may see some drastic changes going forward. Unfortunately for Laura, though, she has no power to influence the outcome of the university restructure and is left wondering where her museum will "fit" in the new configuration. Depending on the outcome of the restructure, Laura will have to make adjustments in the Teaching and Learning domain, while her supervisor will have to make adjustments in the Political domain and the Financial domain.

Ana's institution is small, but mighty. The structure of her museum is such that Ana sits at the leadership table with her president and other senior leaders, but she is not afforded additional senior staff in her own department to help in a formal leadership capacity. Ana appears to spend a significant portion of her time teaching in the museum galleries while simultaneously trying to lead her department, and as a result feels her

leadership is very reactive. The following excerpt from an interview transcript shows how the Operations domain pulls Ana away from leading in other domains such as the Financial domain and the Political domain:

TN: So it sounds as if you have leaders. They are not formalized within the structure -- they may have a title of the coordinator, and they oversee large program areas for your department and for your institution -- but not in a formal structure where you have a leadership team.

Ana: No, and I think I have definitely shared with the rest of the department that I do see one of the staff members as another leader. Even when I was on leave, I told them that this person is the one who you are going to go to and obviously let everybody know that I think that this person is very qualified and is a leader so they kind of know that. But yeah, no leadership team.

TN: Seems lot of weight to put on your shoulders. So how can you distribute some of that weight? Because right now I'm hearing you talk about how, "Well we had a professional development plan that we all contributed to and we had assigned folks and every month we were going to this at quarterly meetings, but we couldn't sustain it. We have great people, but we don't have an evaluation plan because the institution doesn't support it so I'm going to take that on. I'm going to build the evaluation plan for my staff." It's a lot. Let alone the fact that you're not just an administrator, you're also a teacher.

Ana: And there is no associate education director.

TN: You don't have a support team?

Ana: No, not at all. Right now our department needs an associate (director). Needs an associate [emphasis hers]. It's tough.

Miguel spends the majority of his time in this area attempting to streamline his department, maintain positions, and maintain grant-funded programs. In the four years since Miguel assumed the helm of his department he has eliminated the four-team structure he inherited to create a single department with no separation between teams. In addition, he has reallocated his senior staff into one V.P. of Education and two Associate Directors. There are no managers of teams, only coordinators of program areas. Miguel

admits that at department meetings he fields lots of questions about reporting structure from his staff.

TN: So when this new person starts next week and they say, "I work with at the [science museum]." and someone says, "Oh, great. Who's your boss?" Who do they say?

Miguel: They are going to have to say, "I have three." That's how I see where it's at right now. That's what we're trying to do. . . we're still kind of feeling our way with this. And there is still some -- like the last ed department meeting -- a lot of questions came up about where things are at. Some people in the quarterly reports said they're really frustrated with it, and other people said, "This is great. I love it. I'm getting to do things I wasn't able to do before, I feel like I'm part of the conversation." For some people, they don't mind the messiness of it, and other people we really have to work with them on it.

Examples of Practice Rooted in the Financial Domain

Monique's work in the Financial domain appears hamstrung by the budgeting model her institution utilizes. She is powerless to change this model, it contributes to the toxic culture in her institution, and does not allow for fluidity, entrepreneurship, or a change in direction based on outside opportunities that may arise during the course of a fiscal year. The model that her institution uses is called a 'budget confinement model' which is an approach where monies are allocated to all departments in a given fiscal year, and each department is required to "relieve" that budget over the course of the year. Monique describes it as "a relief-of-the-budget approach versus a build-a-budget approach." So if new opportunities come along that have not already been built into the budget as it is confined, they have to pass on the opportunity. Further, if one department is behind at any point in their efforts to relieve the budget, they can ask for those shortfalls in costs to be shifted to another department. Monique and her supervisor appear to have no authority to change this model:

TN: So in one way does it mean that there is a certain relief in that technically your positions are not grant funded?

Monique: Right, there is that security and stability, which by and large offers huge pros, but when you balance that against the need for innovation or the need to pilot certain things while maintaining, it does put us in a tough position for having to evaluate every decision and how it will affect the budget.

When asked how cost shifting impacts the culture at the aquarium, Monique offered:

> I just want to say that [cost shifting] is not explicit. I mean there is not an opportunity for the culture to noticeably shift to the point where it's like, okay, we are cost shifting. That's our interpretation of what's going on. So I think because it's so implicit or kind of subtle, I think it causes a greater culture shift. It brings about more negative feelings and probably should because if it was put on the table in an explicit way, we'd feel better about that. But would we have to uncover that our costs are shifting because of subtle policy changes. Personally, it makes me immediately become defensive because I think this is just our department or is this other departments. So, just the energy spent at having to kind of put the pieces of the puzzle together. I think it doesn't make for a feel-good transition.

In Miguel's case he is extremely knowledgeable about the financial aspects of his institution, is able to provide institutional leadership in this area, but is at a loss about how to fix the broken budgeting model his institution is using. Further, when probing more deeply into this area of work, Miguel appears to have assumptions about business models that he has not yet come to terms with:

Miguel: The department is considered very important, but the resources don't show me that. I have said that constantly to the board, and it still didn't change my resources this year.

TN: Are you talking money, or are you talking other resources?

Miguel: I'm still talking about money. We still get nothing from General Operating Support.

TN: Is your position still supported by grants?

Miguel: It's supported by grants and contracts and program fees. This entire department is. You've got almost 20 people, a third of the staff right now is in this department that you keep putting at the top of your list, yet there is no general operating support going to this department.

TN: Where does it go?

Miguel: It goes to Biology. . . it goes to Exhibits. . .

TN: Is there a mandate to increase revenue each year?

Miguel: The demand is to increase revenue across the board, but the other issue that I have is that we've done about as much as we can. I don't know how much money Biology can make, I don't know how much money Exhibits can make. We've done a poor job of corporate sponsorship for exhibits. . . But education. . . I've gotten people away from the idea of education as some sort of profit center. But there's still this mindset of education paying for itself. Which, you know, if you want me to keep doing what we're doing and nothing else every year, I can do that. But there's no buffer to do anything new.

TN: So what do you think you'd need to change that?

Miguel: To change the way that they work with this? We need money. The board needs to be more comfortable with the finances and I understand why they're not. Because [things] are still tenuous. We let people go this past year, not in education, but we let people go again. Because we have to keep tightening our belt in other places. The thing that I have to keep coming back to is that we are going to be what we are and nothing else if we keep doing this. If that's what you want, fine. . . This is what you're going to get: Well-respected programs that have been around for 15 years.

Miguel appears to share an assumption in the previous exchange: He seems to believe that changing the business model in his institution requires money.

In this second exchange, he appears to hold an assumption that the "new work" of his department can't exist within the current slate of programs his department offers:

TN: Last time you talked about how the entire department is funded through grants and contracts. Now, if the institution continues to use that model to fund education you said, "We're never going to be able to do anything new." If you're looking at a complete redesign of a program, working with the community partner to do that, could, out of that redesign, the new work happen? So, even if you can't get it from general operating, could the new work exist within the redesigns or revamping or complete throwing out and starting over of something that's already grant funded?

Miguel: Some can. I don't know, though (pause). Yeah, I think what you're talking about -- there are very evolutionary steps. Which have their place as well, but it's very difficult to make that. . . I don't know. I think we could go to a certain degree of that. My biggest issue with the way we we're funded is that we continue to talk about this as an educational institution. Yet we put no resources to that. I'm not asking for people to throw me money and go wherever with that, I have to be held accountable for what we do with it.

Miguel also appears to have an assumption that his department is not doing work that is attractive enough to warrant attention – and therefore money and power– from funders and the board.

> [Biology] has been getting a lot of press. I don't know what that translates into for the museum. But they are in the news a lot. We keep getting told [that] what we do can't be sold. So Joe is on the news, Chris is on the news, Sam is on the news because we release some butterflies are we did this and it's all good work, but they are much more visible. I would like to think we are. We get talked about a lot when we meet with funders even though its general operating funders.

When pressed on this point during our interview, another assumption emerged: Miguel believes that lobbying for more money for his department will take away money from another department:

Miguel: I struggle with it within the structure of what we do even pushing for extra funding extra support to work this sort of thing out because I know what that would mean to other pieces of the museum.

TN: What would it mean?

Miguel: It would mean that the two areas that most rely on general operating, exhibits and biology -- I get frustrated with the attention that they get -- but it would mean a loss of staff there. Something else I'm passionate about, which is our collection and these things that connect us, it would be going backwards in those areas.

In some cases, leaders in this study appear to spend much of their energy in one or two domains while spending almost no time in others. In all cases where this

tendency is present, the domain that has been ignored seems to be the Teaching and Learning domain.

Miguel admits that he leaves the oversight of the teaching and learning responsibility to one of his senior leaders, and the oversight of the operational responsibility to another of his senior leaders. This leaves Miguel time to devote to both the Financial and Political domains, but does not allow him the depth of knowledge and experience to lead initiatives that cross all domains. By removing himself from leadership in the Teaching and Learning and the Operations domains, Miguel appears to only sustain what is already in place.

Laura admits that she feels unequipped to lead in the Teaching and Learning Domain.

> Often I think I stand in the way of my own work in this area. I have a tendency to lecture rather than to encourage others to arrive at the answer themselves, which means I have a lot of learning to do myself on this topic. I would like to have the opportunity to think more about being an effective teacher, both so that I can foster a better learning environment among my educators, and also so that I can better model for them how to be an effective educator. Since most of my educators have no background in this area, they need to be exposed to various theories of pedagogy, and I haven't fully invested in this aspect of their work.

Laura shared in her reflective writing that, aside from the two weeks of training she provides at the beginning of the school year, she does not devote any time for her docents in leading in this domain.

Monique and Rebecca are both leading in large institutions with toxic cultures. Both took over leadership of their respective departments from previous leaders who contributed to creating the toxic environments which ultimately isolated their departments from the rest of their institutions. Given these difficult conditions, much of

their time is spent attempting to repair the damage, re-culture their departments, and change the internal perceptions about their departments.

In Rebecca's case, as a first-tier leader, she appears to have to spend considerably more time leading ACROSS in her efforts to change the internal perception about her department, which means that she may have less time to devote to leading IN:

> There are a number of resisters in my organization, but fortunately, none of them are on my team (at least none that I know of!). The individuals I battle the most often are resistant to change. When I challenge them, I hear from these individuals, "Because this is how we've always done it" and similar rationalizations for not wanting to try a new or different approach. . . even when the old approach produces the same lack-luster results. Although, I'm not entirely sure why these individuals resist change, I do know that working with them takes a lot of patience and careful maneuvering, so as to not step on toes. There is a significant lack of trust among senior leadership at my current organization, and some of that stems from mismanagement of people and resources by former leaders of my department. This is a major issue that continues to need to be addressed, though no one explicitly calls it out. I knew there was baggage as well as many bridges to be rebuilt, however. I thought these issues would have waned after nearly 3 years into my tenure at the zoo. . . but, alas, they linger.

Monique, as a third-tier leader in a very large institution, is afforded little opportunity to lead ACROSS or UP, but is instead internally focused in the Operations Domain. Monique brings with her a background in business and a degree in early childhood administration, so some of her work in the Operations domain overlaps in some ways with the Teaching and Learning domain. However, her energies, while intended to improve in the Teaching and Learning domain, are primarily centered on categorizing visitor learning into types of products which can be sold. At Monique's level, this may not be a bad thing. She and her director work as a team to lead the department and appear to have split responsibilities between the domains; with Monique

leading the Operations and Financial domains and her Director leading the Teaching and Learning and the Political domains.

> We refer to it as our pyramid of engagement and the pyramid consists of four tiers. Within each tier there is a very clearly articulated way of how resources should be managed and then also what the learning environment should broadly be meant to accomplish. So at the base of the pyramid is what we call 'engage and change.' So at that level we want to approach learning environments where we are hooking people into what [the aquarium's] mission is and what we have to offer. Really reaching out and using our resources to reach a broad base of people. Really approaching it as a numbers game, per se, so we are attempting to hook in a lot. Not everyone will be hooked and be able to continue their level of engagement with us. Of course, the instructional strategies are, for lack of better word, they are not as heavy. They are light fare. So the idea is that they would be hooked and there would be some way of triggering higher levels of engagement, either with [the aquarium], or with our mission and then at the second-tier of engagement which is 'question and investigate.' So at that level you will find a little bit higher resources per learner, higher levels of engagement on our part to work with them, and then also trying to get the learner to a place where they are able to now just take not only what we have to offer, but to really question and investigate and go a little bit deeper with what we are in any number of our science environment conservations. So then, at the third tier is 'problem solving.' So again what we are seeing in our smaller programs, higher focus on the learner, more time and money spent on them, critical thinking skills, more ingrained what we call problem-solving, so at that point we shift more from an individual and their place in this ecological system to thinking about the system as a whole. So we attempt to then encourage learners to start problem-solving with us and then at the top of the pyramid is what we call 'leading others.' Very high engagement programs, typically month-long, semester long. They can plug-in at any level of the pyramid but at the highest level we are really looking at creating converts. And by that we mean those who are able to now be ambassadors for the aquarium and our mission and actually engage others.

Grounded Theory, Continued

For all the participants in this study, each appears to have one domain in particular in which they seemed to spend most of their time and energy. For Rebecca, Monique, and Laura it appears to be the Operations domain; for Miguel, it appears to be

the Financial domain; and for Noelle and Ana, it appears to be the Teaching and Learning domain.

Upon review of the themes, the domains, and the lens through which all their practice is done, I continually asked myself if there was anything about their practice that I was missing. Was there a domain I have not yet discovered? I also wondered about areas where practices overlapped in domains. Does leading successfully in overlapping areas have an impact on visitor learning? For example, if one participant was really strong in the Financial domain but less strong in the Teaching and Learning domain, what impact might that have on the learners who visit the museum? What about those participants who, because of the way in which their department is organized, is isolated in one domain. For example, if one participant spends most of her time teaching programs, what impact does that have on her ability to advocate for her staff, to grow the department in new ways, to reach out to the community, and to fix broken systems? Further, if the leader cannot pay enough attention to anything other than the Teaching and Learning, does that impact the learners at all? If so, in what ways? Finally, if one participant operates successfully in all four domains and settings, what is she doing that others are not, and how does that impact visitor learning in her museum?

CHAPTER SEVEN

CONTINUING QUESTIONS AND THE WORK AHEAD

In Chapter Three I discussed how I created an "As-Is" and a "To-Be" using the Wagner framework as my guide. I also stated that I would compare the "As-Is" created by each of my participants with my own to see if I could somehow articulate a single "As-Is" for the group. What I discovered is that a single "As-Is" may not be possible to articulate without resorting to generalized statements, thus rendering it useless. Much like the learners in any museum bring their own experiences and prior learning with them when they walk in the museums doors, each individual in this study has different contexts, cultures, and conditions in which they work. They each have a different set of competencies which requires that there be multiple approaches to building their capacity as leaders. Like any good teacher, I will need to assume difference and differentiate for these leaders if I am to be successful in helping to develop current and future educational leaders in museums.

Further, during the workshops, I began to wonder whether the Wagner framework might be better utilized by my participants as a tool for individual growth as a leader. What if, instead of asking them to identify a problem statement that represented an institutional (or even a departmental) problem, I asked them to articulate a problem statement that helped them to address their most pressing leadership challenge as individuals? In what ways might the leaders' practice change as a result of using the framework in this way?

Below are problem statements generated both by me and by the participants:

Participant	Problem Statement
TN	Building leadership capacity among museum education department leaders
Laura	Unclear which direction our education department should go, given the changes in our institution in the past five years
Noelle	Lacking an annual or multi-year institutional strategy leads to confusion around priorities and allocation of resources
Ana	Lack of plan to gather, track, and analyze data to improve museum programming, funding practices, determine impact and share best practices
Miguel	Building a professional learning community in the education department that can affect change across the institution
Rebecca	Shifting the internal view of our visitors from "consumer" to include "learner"
Monique	Defining visitor learning at [the aquarium]. . . defining the difference(s) we 'the organization' want to foster in our visitors/ learners

Figure 6: "As-Is" Problem Statement Comparison

It is clear that the problem statement I created is different in scope and scale than the others. My problem statement represents the scope of my own future work. It's what I want to work on as a leader. My problem statement transcends a single institution and encompasses the entire profession, and it's really about me and what I want to do. The statements generated by the participants in the study deal with struggles they face as leaders in a single museum, but do they address the biggest problem each individual

leader faces? Their statements revolve around two areas of their work: Changing institutional perceptions about their department or their visitors, and the lack of planning or strategies for prioritizing the initiatives in their museums. I believe these statements don't go far enough. Do they inspire each leader to raise their own professional standards, or will they be yet another tool they grapple with for a while and then put on the shelf next to the strategic plan?

The Work Ahead

I understand that the nature of grounded theory is that there is never an empirical "answer," nor can one assume a positivist tendency to say, "This is it! This framework will apply to all leaders of museum educators!" What I have put forth in this dissertation is an emerging model I aim to refine with continued research into the practice of other museum education leaders, as well as other types of leaders in museums, not the least of which is museum presidents themselves. Let's circle back to Chapter One for a moment. In Chapter One I asked the question, "Do museum presidents think museum educators are expendable?" It is a question I still wonder about. Thanks to my grounded theory I now have a researched-based starting point to examine new areas of investigation based on the data given to me by the participants in my study.

In my next phase of research I will shift my gaze from understanding how these leaders perceive of themselves to examine how the stakeholders with whom they interact perceive of museum educators. Will these stakeholders shed light on domains of practice I missed? I am hopeful that theories continuing to emerge from my next study might help me bridge internal perceptions of self with external perceptions of the field.

My deepest hope is to affect change. For example, if leaders of museum educators were better prepared, better networked with each other, and had fewer knowledge gaps, would that make a difference in the amount of power and authority they have in their own institutions? If so, how might an increase in power and authority on the part of museum educators affect the relevancy of the institution? Even more pressing, if leaders were successful in operating in each domain and in each setting while maintaining an unrelenting focus on the visitor as a learner, would that make a difference in how museums are valued by the public? What about the quality of learning the visitors experience? Would that change, too?

My motivation for elevating the practice of leaders in museums stems from my fears about the current state of public education in America. When I look at the external pressures being placed on public schooling in the States I can't help but think that museums are missing an opportunity to play a stronger role in education reform. For example, schools in the United States are suffering as a direct result of the economic recession that still grips this nation. School budgets are being slashed, teachers are being laid-off, and teacher unions are at risk. Ultimately, this means that students are at risk. It appears we are reaching a tipping point. The Chinese character for the word "crisis" is the same as the character for the word "opportunity." I see an opportunity for museum educators to find a seat at the reform table, but it will take skilled and informed leaders to bring this voice into the discussion.

The domains I discovered as a result of my dissertation work represent the foundation I was searching for when I left my museum in 2005. As such, they represent the work ahead for me: I intend to continue research and refinement of these domains as

they relate to the museum sector. My hope is that out of this research I can build a foundation upon which other leaders of museum educators can stand. My hope is that they may realize a new professional standard; one that empowers them to play a more central role in education reform efforts, enables them to better position museums as centers for lifelong learning and community engagement, and positions them as leaders who can guide museums toward increased relevancy and public value in the 21st century.

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Appendix A

Learning Communities Survey Administered to Museum Educators

(This survey was administered to museum educators across the United States and Canada in the summer of 2009.)

Purpose: I propose creating an attitudinal survey asking specific questions about how museum educators learn together in their respective departments, and how they believe they are perceived by colleagues outside of their department.
Hypothesis: A majority of the museum educators surveyed do no perceive that their departments operate as learning organizations, and a majority of museum educators believe their department is not perceived as central to the mission of the institution(s) in which they work.

Gather Demographic Data: (use this to correlate attitudes based on position, museum type, department type, museum size, years of experience, and salary level)

- Title (select one)
    - Vice-President
    - Director
    - Curator
    - Manager
    - Supervisor
    - Coordinator
    - Educator
    - Other
- Department Size
    - Number of full-time staff in your department__
    - Number of part-time staff in your department__
- Name of your department (open ended) Examples: education department, exhibits department, interpretation department, visitor services department, etc.)
- Institution Type (select one)
    - Art or History Museum
    - Science Center or Natural History Museum
    - Zoo/Aquarium
    - Botanic Garden/Arboretum/Nature Center
    - Historic House or Historic Site
    - Children's Museum
- Annual visitation rates (select one)
    - Up to 249,000 visitors annually
    - Between 250,000 - 499,000 visitors annually
    - Between 500,000 – 1,000,000 visitors annually
    - More than one million visitors annually

- Years in museum education field (select one)
    - 5 years or less
    - 6-10 years
    - 11-15 years
    - 16 – 20 years
    - 21 years or longer

- Salary range (select one)
    - Less than 30k dollars annually
    - Between 31k – 40k annually
    - 41k – 50k annually
    - 51k – 80k annually
    - More than 80k annually

To what extent does the staff in your department learn together? Please state the degree to which you agree or disagree with the following statements:

- There is an established mentoring program in place for new and veteran educators in my department
- I collaborate with my colleagues, utilizing research-based frameworks and tools to create and improve programs and/or exhibits and/or interpretive materials
- The professional development plan for my department provides learning experiences that are highly relevant to my job
- The professional development offered for my department is on-site, collaborative, job-embedded and led by educators who know about best practices in teaching and learning
- There is time built into my work to diagnostically assess the impact of my teaching practice
- I engage on a regular basis with my colleagues in book/article discussion groups on topics related to my work in the museum

In what ways do you collect, utilize, and disseminate the results of your program or exhibit or interpretation evaluation? Please state the degree to which you agree or disagree with the following statements:

- I am directly involved in evaluating programs and/or exhibits
- I work with my colleagues to use the data gathered from program evaluation and/or visitor studies to inform the creation of new programs, exhibits, and interpretive materials
- I meet on a regular basis with others in my institution who are responsible for evaluation and assessment
- I write about the findings from our evaluation in publications such as the museum newsletter, peer-reviewed journals, papers for my graduate program, in books, or for museum association publications

In your opinion, how involved is your department in setting institution-wide priorities or initiatives? (select only one)

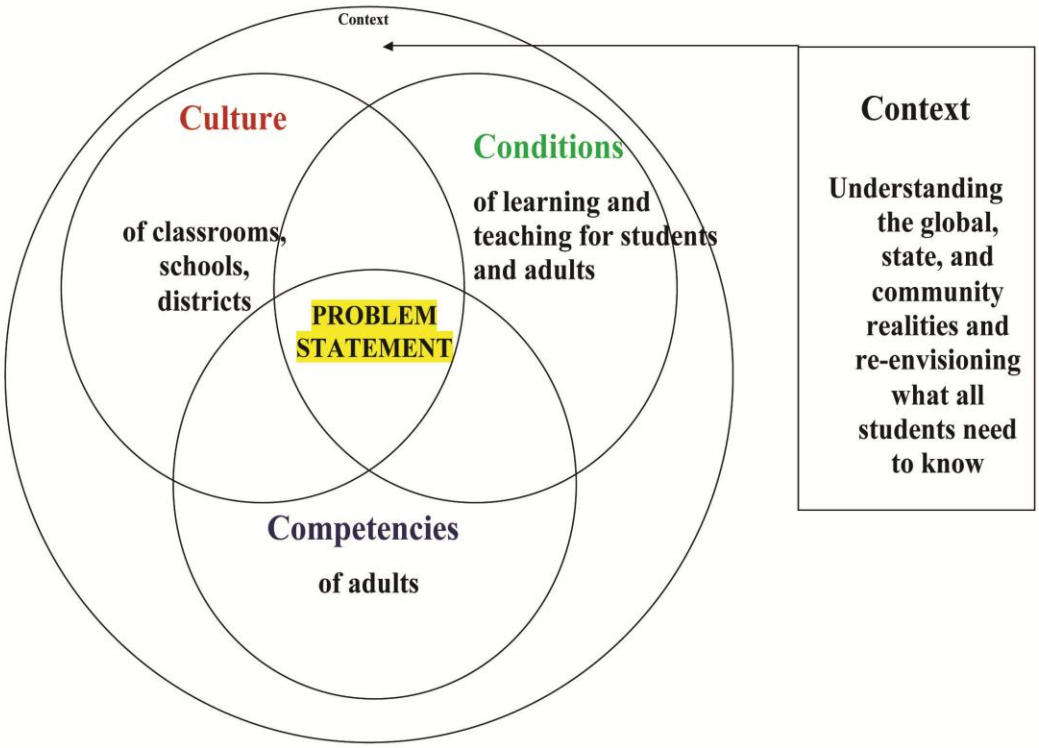
My department plays an integral role in institutional decision-making
My department plays a limited role in institutional decision-making
My department often must react to institutional initiatives which we had no part in crafting

In your opinion, how do you think your department is perceived by others in your institution in relation to your department's role in fulfilling the mission of the museum? (select only one)

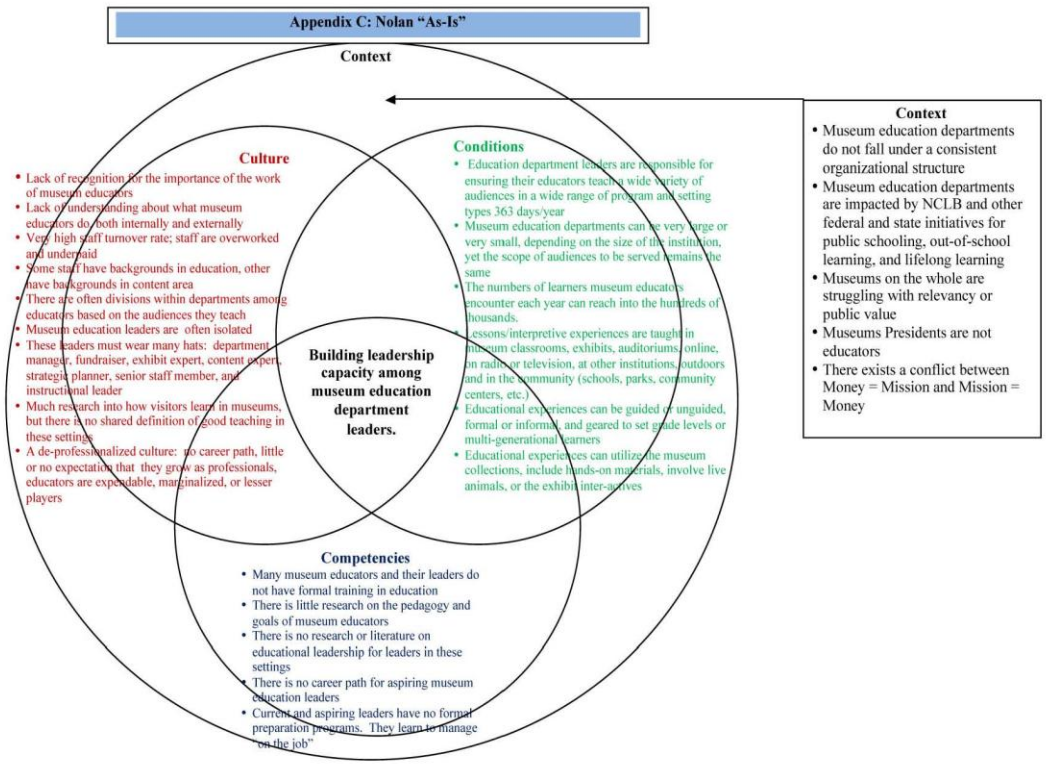
- My department is perceived by others in my institution as playing a critical role in meeting the mission of the museum
- My department is perceived by others in my institution as playing a limited role in meeting the mission of the museum

My department is perceived by others in my institution as not playing a critical role in meeting the mission of the museum.

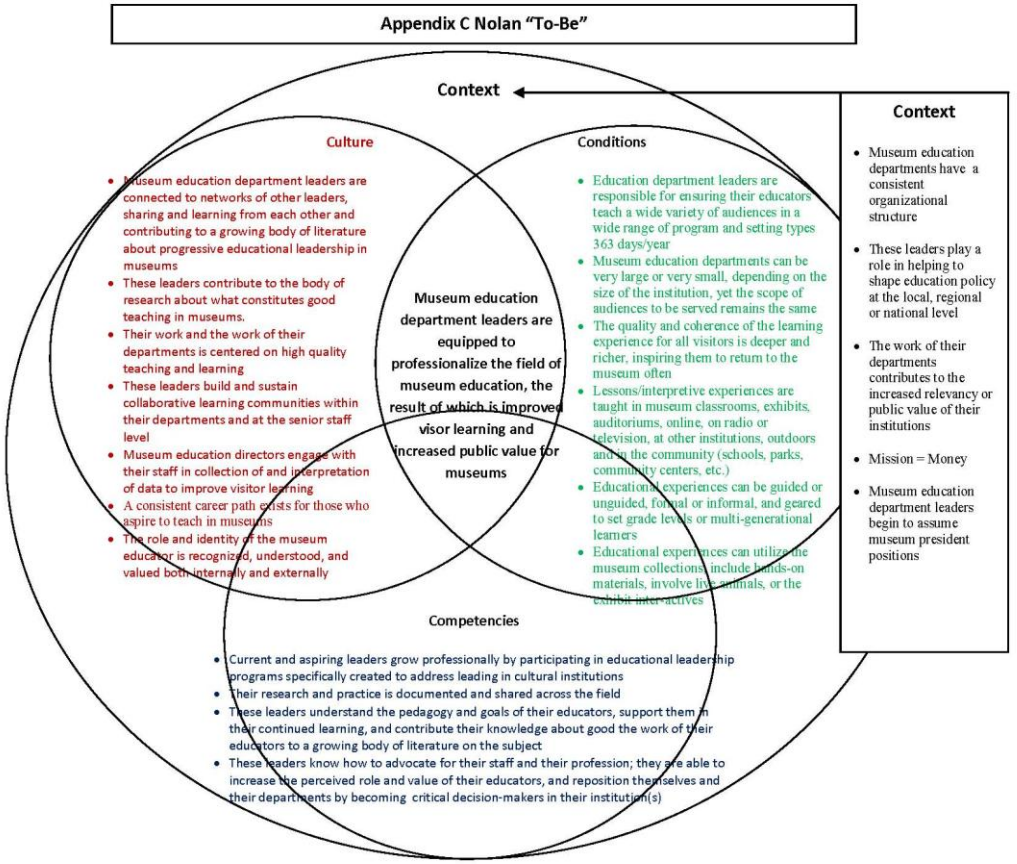
Appendix B: Wagner's "AS-IS" 4C's Framework



Appendix C: Nolan "As-Is"



Appendix C Nolan "To-Be"



Appendix D

Nolan, Tina R.
Pre-Workshop One Reflective Question
January 4, 2011

Source: Fullan, Michael (2001). Understanding Change. In *Leading in a Culture of Change.* San Francisco: Jossey-Bass.

Reflective Questions

1. Review the leadership styles defined by Goleman on page 35. Likely you possess more than one style, and you utilize different styles depending upon the situation. For as many of the styles as apply to you, think back to a specific instance where you drew upon a particular style. Name the instance (pseudonyms, please!). Describe what happened and how you led in those instances. What were your leadership take-aways from these experiences? The table below is simply an organizer for your thoughts. Feel free to use as much space as you need to complete this exercise.

	Coercive	Authoritative	Affiliative	Democratic	Pacesetting	Coaching
Instance						
Assessment						

2. How do you support learning about learning? What, specifically, do you do as a leader to foster a learning organization? If you feel you are lacking in this area, what would you need to build your capacity in this area? Remember, building a learning organization (much like operating in a culture of change) is not a linear process. There is no recipe to follow. Think about areas for growth here.

3. Who are the resisters in your institution (pseudonyms, please)? Why do you think they resist? And how do you work with them?

4. After reading this article, what do you believe are the major components to include when trying to affect change in your institution? What barriers will need to be overcome in your institution to be successful?

Please email me your responses to these reflective questions by January 13, 2011. Tina.Nolan@nl.edu. Thank you for your time and good thinking!

Appendix E: Workshops One and Two Wagner Framework Notes

Tina Nolan
Dissertation Workshop One
January 13, 2011

Wagner 4C Definitions: Adapted for Museum Educators

Competencies

Most efforts to improve education have at their core a focus on professional development as a way to build the competency of teachers. In the school world there is an institution-wide focus on teacher professional development as a direct link to achieving the mission of all schools: to ensure every child graduates. However, many museums have competing missions and priorities: are we about visitors learning something? Are we about preserving our collection? Are we about generating revenue? Depending on your institutional culture, the education department in your museum might drive the agenda or it may take a back-seat to one or more competing priorities.

Regardless of where your institution falls, those in your education department share the belief that those who teach (or those who create learning experiences) must possess a repertoire of skills and knowledge that influence visitor learning. Skillful, competent adults are a foundation for this work. Therefore, educators and administrators at every level of the department need to develop their competencies regularly through ongoing development opportunities. This is not a new idea. But we have come to understand the limits of competency-building as a standalone strategy for change. Even with a focus on improving teaching and learning, developing educators' competencies is necessary but insufficient for ensuring educational impact for all visitors.

Research shows that competencies are most effectively built when professional development is focused, job embedded, continuous, constructed, and collaborative. But -- and here's where the system comes into play -- implementing this type of professional development necessarily implicates many parts of the system.

To begin identifying the competencies of your museum educators, you can start by asking yourself the following questions:

***How do we*:**

- Build a pedagogical foundation for educators with content knowledge, but no formal training in education or museum studies?
- Foster the development of educators who possess formal training and/or teaching certification, but who have no formal training in museum work?
- Identify what our visitors want to know and need to know?
- Gather and interpret data?
- Collaborate?
- Give and receive critiques?
- Productively disagree?
- Reflect and make midcourse corrections?
- Measure our impact on the museum, on the community, and on our visitors?
- Demonstrate the value of our work to our colleagues outside the education department?

Can you think of other questions to ask to help you fully describe the competencies of your museum educators?

Conditions

For many, opportunities to further develop and efficiently use the new competencies they've acquired are seriously undermined by the conditions of work imposed on them. We define conditions as the extra architecture surrounding visitor learning; the tangible and intangible arrangements of time, space, and resources.

Some examples include:

- Time spent with and for visitors, with colleagues, with stakeholders, and with the community
- Time spent teaching
- Time devoted to developing educational experiences
- Time set aside for reading and research
- Time spent engaged in initiatives that are peripheral to teaching and learning
- Scale and structure, including size of physical building(s), organization of physical building, number of visitors served annually, scope, scale and frequency of programs and interpretive experiences offered

What are other examples of conditions that relate to museums?

To begin identifying the conditions in which your museum educators work, you can start by asking yourself the following questions:

***How well do we create and maintain*:**

- Time for problem solving, for learning, for talking about challenges?
- Relevant and user-friendly visitor data?
- Agreed-upon definitions of what good teaching looks like for all audiences served?
- Agreed-upon measures of success for all audiences served?
- Clear priorities and focus for each person's work?
- Department and building level support?

Culture

We defines culture as the shared values, beliefs, assumptions, expectations, and behaviors related to visitors and learning, teachers and teaching, instructional leadership, and the quality of relationships within (and sometimes beyond) the museum. Culture refers to the invisible but powerful meanings and mindsets held individually and collectively throughout the system.

To begin identifying the culture in which your museum educators work, you can start by asking yourself the following questions:

- ***How would we characterize*:**
  - Our department's level of expectations for all visitor learning? (Consistently high? Medium? Low? Or a mix of these depending on which learners?)

- Our institution's level of expectation for all visitor learning?
- Our museum's agenda? (Multiple and unrelated? Frequent changes? Steady, consistant focus? Related initiatives that build on each other?)
- The communication between institutional and departmental leadership to educators? (Directive? Compliance oriented? Democratic?)
- Adult relationships with each other? (Trusting? Toxic? Territorial?)
- Adult views of responsibility for all visitor learning? (Blames others? Opts out? Sees various contributors, including oneself?)

Can you think of other questions to ask which will help you to characterize the culture of your museum?

Context

A fourth influence is the larger cultural, historical, and economic contexts in which all of these efforts take place. By context we are specifically referring to the museum's readiness to:

- Play an active role in helping citizens to succeed as providers, learners, and citizens in the knowledge economy of the future (this includes 21st Century Skills)
- Achieve cultural proficiency and respond in a meaningful way to the rapid demographic shifts currently taking place in the United States
- Understand the global context and its relation to the museum's reason for being – that the world in which children are growing up will be very different from what we experience today

Context also refers to the larger organizational systems within which we work, and their demands and expectations, formal and informal, for museums. This might be the museum, which is a member of the Museums in the Park organization, which is part of the City of Chicago, which exists in the state of IL, which exists within the context of the federal government. We need to understand all this contextual information to help inform and shape the work we do to transform the culture, conditions, and competency of our museum. And we may, in turn, need to influence elements of the context in which we work as well.

To begin identifying the context in which your museum educators work, you can start by asking yourself the following questions:

How well do we:

- Understand education reform issues, and the "skill demands" all students must meet to succeed as providers, learners, and citizens?
- Understand the particular aspirations, needs, and concerns of the families and communities that the museum serves?
- Understand demographic and cultural trends which will impact museum visitation, relevance, and public value?
- Understand the worlds from which all visitors come?

- Understand and work with students, teachers, adults, young children, and families?

Exercise 1.1: Identifying the Problem

1. From your vantage point in the museum, what do you see as the greatest challenge you and your colleagues face related to improving your "system" to the new challenges we face in education and society? What is the number one problem you are trying to solve?

2. What are some of the organizational changes required to solve this problem? What practices, structures, or policies would need to change in your museum in order to solve this problem?

3. Are there organizational and individual beliefs and behaviors associated with this problem that may need to be changed; beginning with your own? From what to what?

4. What might be some of the implications for leadership at your particular level to solve this problem? What might you, as a leader or group of leaders, do differently?

Exercise 2.1: Refine your problem statement

1. How clearly does your problem statement recognize the quality of teaching and its relationship to visitor learning?
2. What do you think the impact on the educators and/or the visitors will be if your problem is solved?

If you've named goals such as curriculum alignment, better communication, and the like, (what we believe are peripheral goals) we suggest you name the specific links that connect to that goal to the ultimate results you seek in visitor learning. Improving instruction may turn up somewhere in that chain. Or you may wish to think about another problem or challenge that is more directly related to instruction and then consider, or discuss with your group, what ideas you have about how to improve instruction.

Sample Problem Statements

Focused on your department or your institution	Focused on the museum education profession as a whole
Positioning the education department at the top of the institutional hierarchy	**Building an educational research agenda for the profession**
Getting the educational mission of my institution to drive the approach toward budgeting	**Positioning museums as equal partners in the education of all children**
Elevating the practice of the museum educators in my institution	**Establishing a shared set of educational practices across museum type, geography, and size**

Refining the As-Is

Now that you've had a chance to identify your problem statement and work with the 4C's, you can gain more clarity about your readiness to tackle the problem by considering the following questions:

1. Through this exercise, does your understanding of the problem change in any way?
2. Do you see new or different ways of going at the problem?
3. Does your diagnosis begin to suggest some work that needs to be done before other work can be undertaken?

Do you feel ready to answer these questions? If not, what more would you need to know? Are there specific data you need to collect in order to develop a robust picture of the various contributions of the 4C's? How might you collect these data? What is your next step?

Moving Toward the Goal, Using the 4C's

1. **Create a Picture of Success**: What would success look like if the problem you identified (in the middle of your As-Is picture) were solved? In other words, what results do you want your new system to create? Be as precise and specific as possible. Write a description of this picture of success into the middle of the 4C's visual provided.
2. **Build the To-Be Picture:** Complete the figure by identifying all the changes within each of the four arenas of change – competencies, conditions, culture, and context – that are necessary if you are to realize your picture of success. You may wish to revisit the questions we identified during the As-Is phase of our work to prompt future-state thinking. (Fig. 1.1)

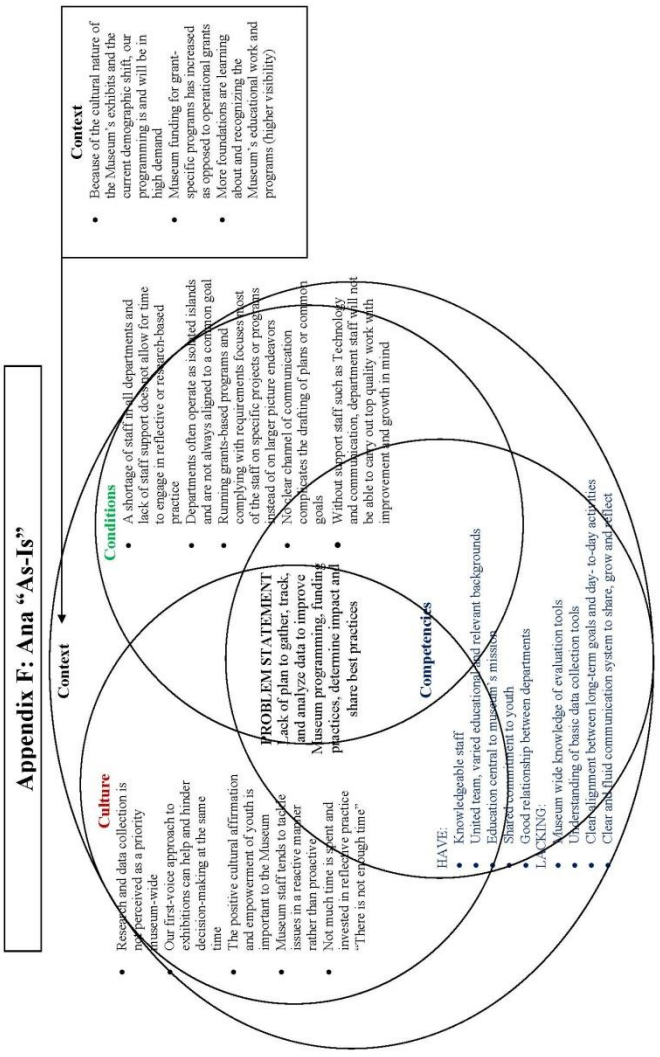
Map these changes onto the visual within the most appropriate circle. Some changes you identify may not fit neatly within a single circle; place these in the appropriate overlapping spaces of the diagram. We encourage you, in completing this visual, to be exhaustive in your thinking – list every change you imagine will be necessary to solve your problem. Think, in true systemic fashion, of the relationships between the change arenas. What relationships will exist, and what shifts will they cause in other arenas? What might need to be intentionally engineered in one area to provoke change in anther? This completed visual represents your TO-BE picture, a systemic and dynamic vision of the future to which you aspire. This visual should help you identify the landscape of work that is necessary in order to make progress on the problem in your AS-IS picture.

Fig. 1.1

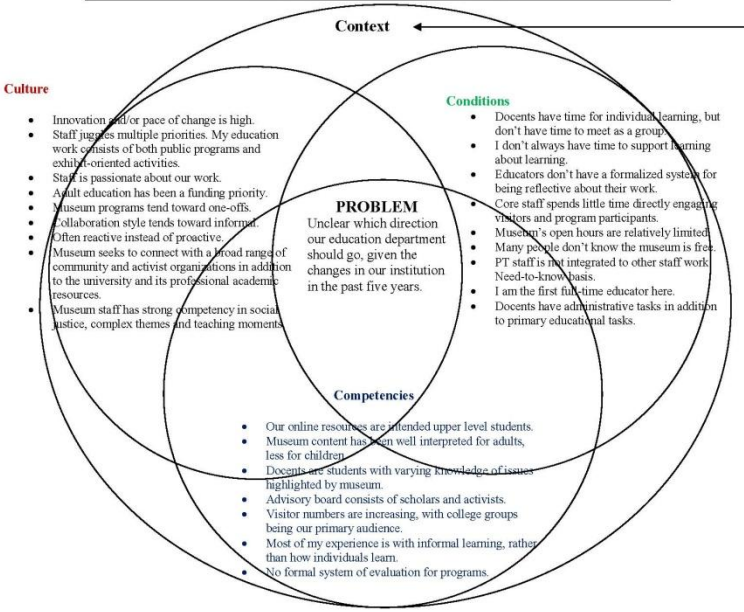
Competencies: How do we…	***Conditions: How well do we create and maintain…***
○ Build a pedagogical foundation for educators with content knowledge, but no formal training in education or museum	○ Time for problem solving, for learning, for talking about challenges?

studies? ○ Foster the development of educators who possess formal training and/or teaching certification, but who have no formal training in museum work? ○ Identify what our visitors want to know and need to know? ○ Gather and interpret data? ○ Collaborate? ○ Give and receive critiques? ○ Productively disagree? ○ Reflect and make midcourse corrections? ○ Measure our impact on the museum, on the community, and on our visitors? ○ Demonstrate the value of our work to our colleagues outside the education department?	○ Relevant and user-friendly visitor data? ○ Agreed-upon definitions of what good teaching looks like for all audiences served? ○ Agreed-upon measures of success for all audiences served? ○ Clear priorities and focus for each person's work? ○ Department and building level support?
Culture: How would we characterize… ○ Our department's level of expectations for all visitor learning? (Consistently high? Medium? Low? Or a mix of these depending on which learners?) ○ Our institution's level of expectations for all visitor learning? ○ Our museum's agenda? (Multiple and unrelated? Frequent changes? Steady, consistent focus? Related initiatives that build on each other?) ○ The communication between institutional and departmental leadership to educators? (Directive? Compliance oriented? Democratic?) ○ Adult relationships with each other? (Trusting? Toxic? Territorial?) ○ Adult views of responsibility for all visitor learning? (Blames others? Opts out? Sees various contributors, including oneself?)	***Context: How well do we…*** ○ Understand education reform issues, and the "skill demands" all students must meet to succeed as providers, learners, and citizens? ○ Understand the particular aspirations, needs, and concerns of the families and communities that the museum serves? ○ Understand demographic and cultural trends which will impact museum visitation, relevance, and public value? ○ Understand the worlds from which all visitors come? ○ Understand and work with students, teachers, adults, young children, and families?

Appendix F: Completed "As-Is" Assignment by Participants



Appendix F: Laura "As-Is"



Context

Significantly less funding for fieldtrips mean we have fewer K-12 students who visit.

Despite free museum, diversity of visitors does not match that of city.

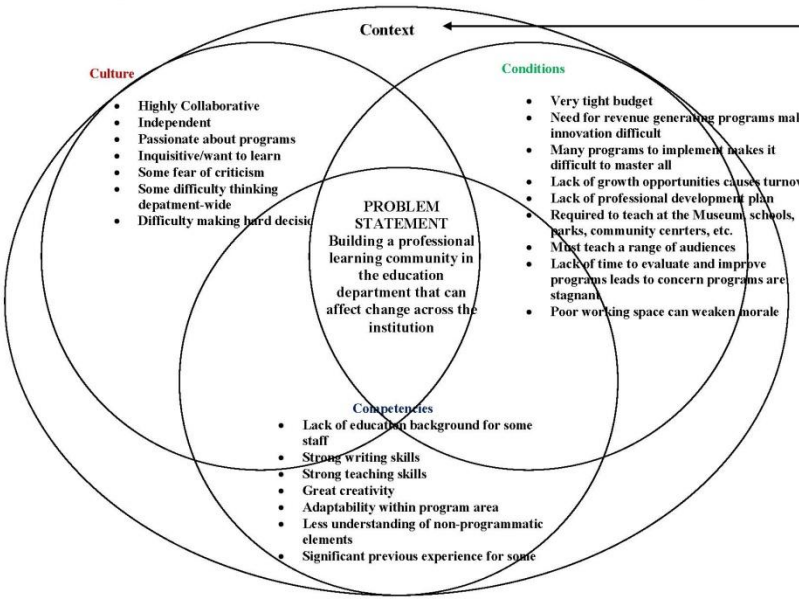
Students learn differently in the 21st Century. Museums must inspire and encourage civic engagement.

Central questions:
What audience should we focus on?

Is our department exhibit or program oriented?

What is our educational mission for the 21st Century?

Appendix F: Miguel "As-Is"



Context

Museum education is expected to respond to formal education initiatives/legislation

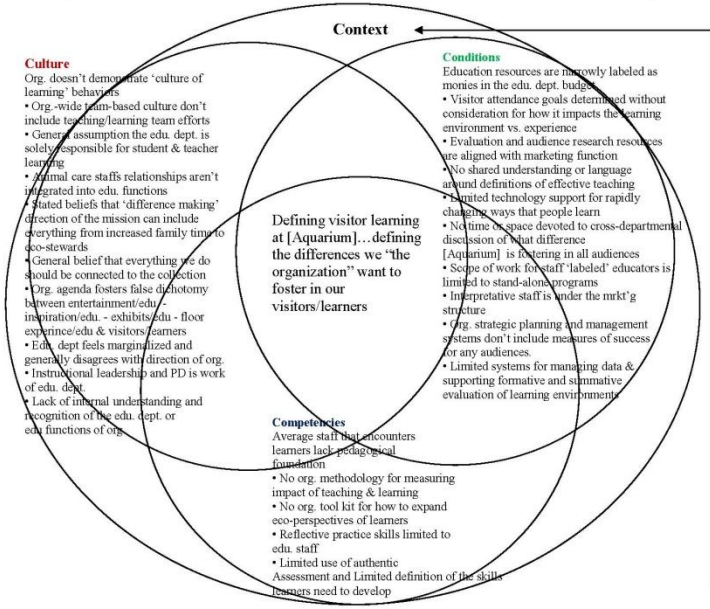
Museums are touted as educational institutions externally but not internally

Belief by many that anyone can teach

Lack of team thinking at senior staff level (silos)

Turmoil in the public

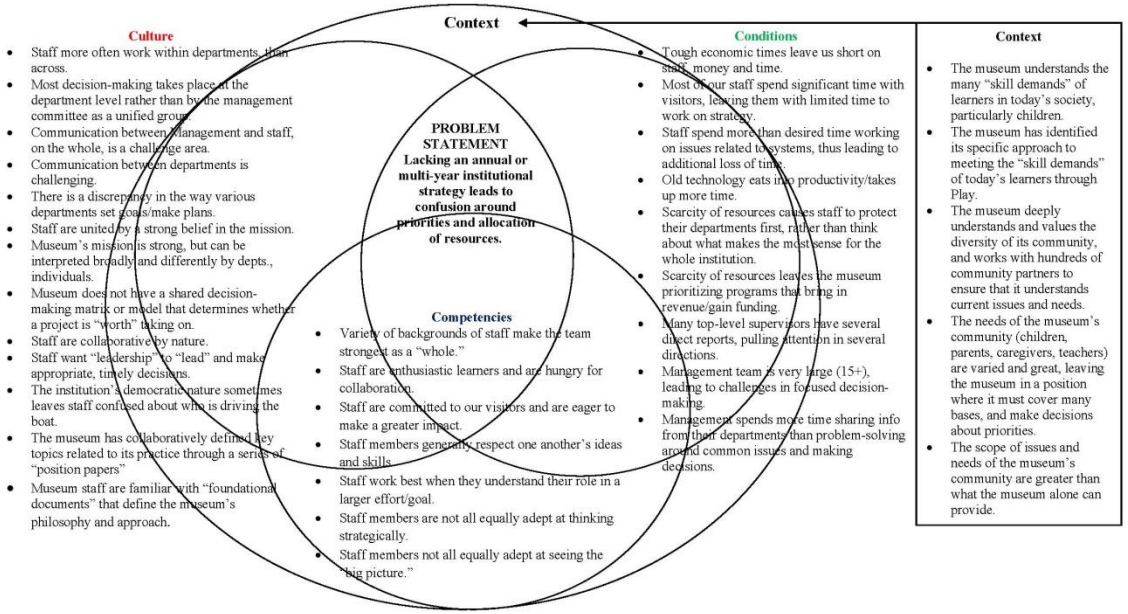
Appendix F: Monique "As-Is"



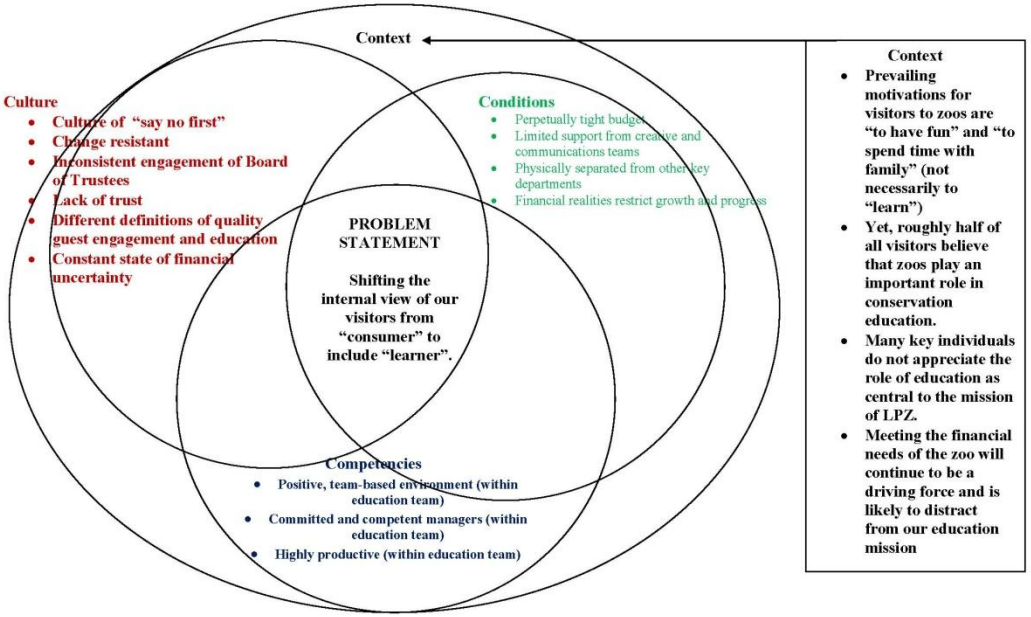
Context

Museums with living collections are increasing being asked to justify their existence – relevancy – public value
• Consumers are increasingly becoming more conscious and asking the same of org. they support
• Funders are increasingly asking for measurement of impact
• The natural environments our collection needs is increasingly under pressure to survive
• The teaching and learning field is shifting towards more participatory learning environments as a way to foster change in people
• The edu. dept. isn't aligned with the education function of the org.
• Our org. typically limits the definition of 'learners' to participants in education programs
• With increasing aces to digital information society is becoming more and more of a collection of life-long learners
• Only 2/12 of the executive leadership are educators…and those 2 aren't progressive educators and have limited influence
• There seems to be an unresolved conflict between earned revenue and mission fulfillment and even great conflict around the direction the mission sets for the organization
• Limited understanding of who our visitors are and what they expect of their experience
• Org. not willing to take a position on difference
'we' want to see in the world

Appendix F: Noelle "As-Is"



Appendix F: Rebecca "As-Is"



Context

- **Prevailing motivations for visitors to zoos are "to have fun" and "to spend time with family" (not necessarily to "learn")**
- **Yet, roughly half of all visitors believe that zoos play an important role in conservation education.**
- **Many key individuals do not appreciate the role of education as central to the mission of LPZ.**
- **Meeting the financial needs of the zoo will continue to be a driving force and is likely to distract from our education mission**

Appendix G: Systems thinking activity completed during workshop two

Dissertation Workshop Two
Tina Nolan
Winter 2011

Identifying the Systems

Systems Thinking Article Debrief: 5 minutes

1. Identify the five disciplines Senge defined
    a. Personal Mastery
    b. Mental Models
    c. Building Shared Vision
    d. Team Learning
    e. Systems Thinking: the Discipline that integrates the disciplines

2. Beginning to unearth the systems in your school building: Let's figure-out the "buckets"
    a. Operational/Logistical: facilities, technology support, the physical plant
    b. Instructional Support for Educators: mentor programs, supervision plan, PD plan
    c. Visitor Support: have the students list 2 or 3 examples…
    d. Program/Exhibit Support: have the students list 2 or 3 examples…
    e. Others?

Carousel Brainstorming Activity: 30 minutes

1. Hang the paper "buckets" on the walls of the classroom
2. Announce the groups
3. Hand marker to one representative from each group
4. Instructions:
    a. Each team will visit each bucket and brainstorm the systems in their respective institutions that fall inside each bucket
    b. After 5 minutes, each team will shift to the next bucket and repeat the process, taking their colored markers with them so that they know which brainstorms are theirs
        i. Yes, please feel free to augment other ideas from groups that came before you
        ii. Yes, please feel free to add another bucket if you think of one
    c. Once all teams have visited all buckets they may sit down

Looking for Connections: 10 minutes

a. Any systems up here you are unfamiliar with? Ask for clarification if necessary
b. In what ways are the systems interconnected within and between buckets?
    - **Look across systems to unearth dysfunctional Mental Models**. Why do we do things the way we do them? Are we doing them to enable the visitor to have a positive learning experience, or are we doing them for the convenience of the people who work in the building.

    - **Look across systems for areas where Personal Mastery and Team Learning can occur**. How do you and your colleagues, both individually and as a collective, continue to grow, learn. and share?

    - **Look across systems for areas where Shared Vision is evident**

    - **Are any of these systems broken?** What impact might the broken systems have on other systems?

Reflection:

Think about a part of the system. Choose one system that works well. Why does it work well? What are the characteristics of it that work well? What part(s) are frayed?

Appendix H

Informed Consent – Adult Participant

Thank you for agreeing to participate in this study. The study will take place from September 2010 to February 2011. This form outlines the purpose of the study and provides a description of your involvement and rights as a participant.

I consent to participate in a research project conducted by Tina R. Nolan, a doctoral student at National-Louis University located in Skokie, Illinois.

I understand that this study is entitled The Leadership Practice of Museum Educators

The purpose of this study is to codify the practices of the leaders of museum educators in order to form a baseline for comparison and build sets of tools, frameworks and strategies for current and aspiring leaders of museum educators.

I understand that my participation will consist of two interviews lasting no more than four hours total, two observations lasting several hours, and two half-day workshops. I also understand that my participation will include supplying the researcher, Tina R. Nolan, with written reflections to questions, as well as written documents produced by me or my institution that will inform the research. There may also be one follow-up interview lasting no more than 30 minutes in length. I understand that I will be given the opportunity to clarify information I gave during the interviews.

I understand that my participation is voluntary and can be discontinued at any time without prejudice until the completion of the study.

I understand that only the researcher, Tina R. Nolan, will have access to the transcripts, taped recordings, and field notes from the interview(s) in which I participate.

I understand that the results of this study may be published or otherwise reported to scientific bodies, but my identity and school district will in no way be revealed.

I understand that in the event I have any questions or require additional information I may contact the researcher, Tina R. Nolan, by email at Tina.Nolan@nl.edu or by telephone at (847) 275-6077. I may also contact Tina R. Nolan's advisor, Dr. Linda Tafel, at ltafel@nlu.edu (email) or 773-750-6507 (cell phone). Dr. Tafel's mailing address is 1912 West Hood Avenue, #1A, Chicago, IL 60660.

Participant Signature _____

Date_____

Researcher Signature_____

Date_____